eMARS 603
Personal Service Contracts

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eMARS Personal Services Contracts

1 – Orientation

This course is designed for eMARS users who will create Personal Service Contracts and Memorandum of Agreement and will cover the Commonwealth of Kentucky's Personal Service Contracts process in detail.

- Personal Service Contracts are reviewed by the Finance and Administration Cabinet to ensure that the using agency follows all policy, procedures and statutes that govern Personal Service Contracts:
  - PSC Office reviews PSC
  - Finance-Legal Review
  - Finance-Cabinet Secretary Approval

- 45A.705 All proposed Personal Service Contracts and Memoranda Of Agreement received by the Legislative Research Commission LRC shall be submitted to the Government Contract Review Committee to:
  - Examine the stated need for the service;
  - Examine whether the service could or should be performed by state personnel;
  - Examine the amount and duration of the contract or agreement; and
  - Examine the appropriateness of any exchange of resources or responsibilities.

- 45A.700 Certain Personal Service Contracts in aggregate amounts of $10,000 or less exempt from routine review Personal Service Contracts in aggregate amounts of ten thousand dollars ($10,000) or less during any one (1) fiscal year shall be exempt from routine review by the committee and shall be filed with the committee not more than thirty (30) days after their effective date for informational purposes only.

eMARS contains several features that provide additional support to users who create Personal Services Contracts and Memoranda of Agreement documents. The eMARS Procurement Workspace consolidates in one place the links to the documents and inquiries you will need to complete Procurement functions. eMARS also provides a **Procurement Type** field used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Type** controls which documents may be processed, how Vendors will be evaluated in the Post Award State, and which Authorities may be cited on an Award Document.

Cited Authorities are only applicable to certain **Procurement Types**. When completing a document it is important to select the **Procurement Type** first as this action will filter the list of **Cited Authorities** to show only those that are relevant.

This Personal Services Contracts class is designed to provide you with a detailed understanding of the Commonwealth of Kentucky's Personal Service Contract processes and the eMARS procurement functionality as it relates to Personal Services Contracts.

Learning Objectives

At the conclusion of this session, you will be able to:

- Conduct a Competitive Sealed Bid using the Request for Proposal (**RFP**) document, Solicitation Response (**SR**/**SRW**) and Evaluation (**EV**) document.
- Award a Proof of Necessity Agreement (**PON2**).
- Process an Memorandum of Agreement (MOA) on a **PO2**
- Evaluate Vendor Performance (**PE**).
- Track documents and work in progress using the Lifecycle Inquiry (**LINQ**).

Document Codes & Listings

The following table displays the Procurement document codes, types, names, purposes and how to process payments against award documents.

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
PE	ADM	Performance Evaluation	Record Vendor Performance - Evaluators must be set up on the PEEVALR table by the contract administrator. Based on the Document ID
RN	ADM	Renewal	Used to extend the Master Agreement effective dates by the next renewal period. The periods must be established on the MA document. Created by Copying Forward to a RN document. The RN when submitted creates a new modification of the MA which must be submitted through workflow. The Modification won't be generated until a batch cycle is run during the nightly cycle on the documents indicated effective date.
TM	ADM	Termination	Created by the contract administrator by copying forward from the award document. When submitted to final, a draft modification is created immediately for submitting to workflow. Reason for change is already populated with the reason for termination from the RN document.
CT	AWARD	Contract - 3 Way Match	Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected.
CT2	AWARD	Contract - 2 Way Match	Created only by Centralized Procurement agencies (OMPS, KYTC, DECA and AOC) to be referenced by other user departments. Used for one time purchases of services and for those agencies who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
CTT1	AWARD	Contract - 3 Way Match	Created only by KYTC. Must be created with the end user Department's Document Code in the header so that the Department can create the payment document to be processed. The PRM will be auto-generated when the way match is detected.

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
CTT2	AWARD	Contract - 2 Way Match	Created only by KYTC. Used for one time purchases of services who have received an exemption from 3 way match requirements. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires an Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
DO	AWARD	Delivery Order - 3 Way Match	Created by the end user department from the URCATS search. URCATS only results in a DO award which requires 3 way matching. It references a Master Agreement or MA catalog lines. Payment is made by processing a Receiver (RC) and Invoice (IN) document. The PRM will auto generate when the 3 way match is detected.
DO2	AWARD	Delivery Order - 2 Way Match	Created by the end user department from the URSRCHMA search. User must select DO2 as the target document. It references a Master Agreement or MA catalog lines. Payment is made by processing a Invoice document the PRM will be auto generated when the 2 way match is detected.
MA	AWARD	Master Agreement	Created only by Central Procurement Departments. For recurring or blanket procurement needs. Does not place an order for any goods or services, but establishes pricing and terms and conditions for future purchases for a given period. Can be renewed based on defined renewal periods. Can be individual lines or catalog. Referenced by users either by URCATS or URSRCHMA. Direct payment can be made referencing a MA line or catalog by generating a PRC on the Commodity Group component of the UR Document.
PO	AWARD	Purchase Order - 3 Way Match	Created only by Decentralized Procurement agencies. Used for one time purchases of goods. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Receiver (RC) document and an Invoice (IN) document to be processed. The PRM will be auto-generated when the 3 way match is detected.
PO2	AWARD	Purchase Order - 2 Way Match	Created only by Decentralized Procurement agencies. Used for one time purchases of services. Must be created with the end user department's document code in the header so that the dept can create the payment document. Requires a Invoice (IN) document to be processed. The PRM will be auto-generated when the 2 way match is detected.
PON2	AWARD	Purchase Order	Created by any Department for all Personal Service Contracts/Grants/MOA's which require review by the Government Contract Review Committee. Requires completion of the PON information. Otherwise is exactly the same as a PO document. NO MATCHING REQUIRED. Users make payment by copying forward from the award to a PRC.
EV	EV	Evaluation Document	Created by the buyer to consolidate all Solicitation Responses, enter scoring, award justification. The resultant award is generated from within the EV document.
EVT	EV	Evaluator	Used when using a team for evaluations. EVT documents are loaded into the EV document for use in evaluations.
IN	IN	Invoice	The electronic representation of the vendors invoice in the system. This is not a payment document. It is the vendors billing. User is to enter the invoice date, as shown on the paper invoice, and calculate the payment date, based on the vendor terms.
RIN	IN	Invoice	A Recurring invoice established to generate a matching PRM for recurring monthly payments such as leases, copiers, and other consistent bills.
RC	RC	Receiver	Documentation that the goods were received. Required of all 3-way match awards.
PRC	PRC	Payment Request	The PRC payment document may be created by the end user as a standalone document or reference awards or master agreements with

DOC CODE	DOC TYPE	DOC NAME	PURPOSE AND NOTES
			external vendors.
PRCI	PRCI	Internal Payment Request	The PRCI payment document is created by the end user and must reference an award or master agreement with an internal vendor.
PRM	PRM	Payment Request	The PRM payment document is system generated through the two-way or three-way matching process for payment to external vendors.
PRMI	PRMI	Internal Payment Request	The PRMI payment document is system generated through the two-way or three way matching process for payment to internal vendors. No check or EFT is created. Money is transferred between agencies.
RQS	RQ	Standard Requisition	Usually created from scratch to request goods or services. Used by all departments.
UR	RQ	Universal Requestor	Created from URCATS, and will result in a DO or RQS dependent on whether an item is available on contract or not.
BAFO	SO	Best and Final Offer	Used for a subsequent round of responses to an RFP, limited only to those finalists from preliminary round.
RFB	SO	Request for Bids	Can only be issued by OMPS, DECA, KYTC and AOC.
RFI	SO	Request for Information	Does not result in award, just seeking information on possible solutions, market conditions, etc.
RFP	SO	Request for Proposals	Used by any department for all Personal Service Contracts, or by Central Procurement agencies for complex procurements.
RFQ	SO	Request for Quotes	Issued by any department for solicitation of goods or services within the small purchase delegation for the department.
SR	SO	Solicitation Response	Used to record the vendor's response to a solicitation.
SRW	SO	Solicitation Response	Same as the SR, but generated through the Solicitation Response Wizard.
VCC	VC	Vendor/Customer Creation	Creates a Vendor record. Processed for approval by Statewide Accounting Services
VCM	VC	Vendor/Customer Modification	Modifies a Vendor record. Processed for approval by Statewide Accounting Services
RPO		Recurring Payment Order	Establishes a schedule resulting in regularly produced orders for goods or services. Likely uses include regular stocking of items such as lab tests, which are required to always be fresh.

2 – Commonwealth of Kentucky Procurement Process

Procurement Lifecycle

The Commonwealth's Procurement Lifecycle consists of the following six major phases:

- **Requisition** – a request for goods or services is created.
- **Solicitation** – requirements for goods or services are advertised and Vendors are requested to submit information, quotes, bids or proposals.
- **Solicitation Response** – Vendor responses to Solicitations are received and recorded.
- **Evaluation** – Vendor responses to a Solicitation are evaluated for award.
- **Award** – formal agreements are established with a Vendor to either purchase goods or services or set prices for future purchases.
- **Post Award** – the activities that take place during the remainder of a Vendor contract after award.

It is not required that every procurement go through all of the above procurement phases or to proceed through these phases in sequence. The only two required phases are Award and Post Award. For **PSCs** and **MOA**, as an example, the Requisition (**RQS**) phase is not required.

Agencies will generally follow the processes detailed below:

Requisition

In the Requisition phase, a user creates a request for the desired goods or services. For procurements that exceed an agency's Delegated Authority, a user must prepare a Requisition (**RQS**) document in eMARS to describe the requirement, receive departmental approval, and route to Office of Procurement Services (**OPS**) and Division of Engineering and Contract Administration (**DECA**) for subsequent processing.

NOTE: The Commonwealth will only use the Standard Requisition (**RQS**) document code. Depending on the **Procurement Type**, the **RQS** may be optional.

Solicitation

The eMARS Solicitation phase encompasses the documents and events used to advertise a requirement and request Vendors to submit information, quotes, bids, or proposals. The Solicitation phase has only one document type, Solicitation (**SO**). eMARS uses the following six distinct document codes:

- Request for Information (**RFI**)
- Request for Proposal (**RFP**)
- Request for Bid (**RFB**)
- Request for Quote (**RFQ**)
- Best and Final Offer (**BAFO**)
- Reverse Auction (**RA**)

The **RFP** document and its use in the Competitive Negotiation and Competitive Sealed Bidding processes are covered in detail in this course.

Depending on the **Procurement Type**, the Solicitation phase may be optional.

The Solicitation documents do not have any **Event Types** tied to them, as they do not perform any accounting updates upon submission.

Solicitation Response

Vendors respond to Solicitations issued by the Commonwealth and their responses are recorded. The Solicitation Response (**SR**) phase encompasses the documents and events used to record a Vendor's response to a Solicitation.

Solicitation Response (**SR**) is divided into two main areas:

- Vendor Functionality – operates as a separate application, Vendor Self Service (**VSS**) integrated with eMARS.
- Buyer Functionality – the Buyer performs the following function from eMARS:
    - Enter responses for vendors not registered in Vendor Self Service (**VSS**).

There is only one Solicitation Response document type Solicitation Response (**SR**), and two Solicitation Response document codes:

- Solicitation Response (**SR**)
- Solicitation Response Wizard (**SRW**)

Depending on the **Procurement Type**, the Solicitation Response phase may be optional.

Evaluation

The Evaluation phase encompasses the documents and events used to evaluate a Vendor's response to a Solicitation. Once all bids have been received and a solicitation closing date has passed, the procurement moves into the Evaluation phase where responses are inspected, analyzed, and ranked against all other responses by designated evaluators.

There is only one Evaluation document type, Evaluation (**EV**). The Evaluation document type has two distinct document codes:

- Evaluation (**EV**)
- Evaluator (**EVT**)

Award

Awards range from contracts for consulting services to master agreements for office supplies. The Award phase is the ONLY mandatory phase in the Procurement Process.

The Award phase encompasses the documents and events used to establish a formal agreement with a Vendor, either to purchase defined goods or services or to set prices for future purchases.

The following documents may be used in the Award phase:

- Purchase Order (**PO**/**PO2**)
- Contract (**CT**/**CT2/) (CTT1**/**CTT2 KYTC ONLY)**)
- Master Agreement (**MA**)
- Delivery Order (**DO**/**DO2**)
- Proof of Necessity Agreement (**PON2**)

Post Award

The Post Award phase begins immediately after an Award has been made to a Vendor and encompasses the documents and events that take place during the remainder of the life of the contract.

Post Award encompasses three main areas:

- Matching (receipt of goods and payment)
- Vendor Performance (**PE**)
- Contract Administration

The following documents may be used in the Post Award State:

- Receiver (**RC**)
- Invoice (**IN**)
- Vendor Performance Evaluation (**PE**)
- Termination (**TM**)
- Renewal (**RN**)

The Post Award phase is also used as the central repository for all documentation associated with the Contract Management of a Procurement (e.g. Bid Deposits, Insurance Certificates, Warranties, Bonds, Retainage, Liquidated Damages, etc.).

Procurement Folder

The **Procurement Folder** is the central repository for documents and documentation related to a single procurement. eMARS compiles all activities, documents, and related correspondence for a procurement into a virtual **Procurement Folder** that ties multiple procurement documents and documentation items together. The **Procurement Folder** provides a single point for tracking, assigning, and reporting during the procurement life cycle. Each procurement document will belong to a specific **Procurement Folder**.

Each folder has a unique identification number generated by eMARS which allows users to identify the procurement documents and documentation items that apply to a particular purchase. Each folder also has a **Procurement Title** to easily identify the **Procurement Folder**. The **Procurement Title** is displayed on various procurement related pages to aid in identifying the proper folder for a specific procurement.

Procurement Types

Procurement Types are used to classify and group similar purchases. **Procurement Types** are used to identify the Business Process being followed to procure goods or services for a given requirement. **Procurement Types** control which documents may be processed, how Vendors will be evaluated in the Post Award State, and which Authorities may be cited on an Award Document.

For each **Procurement Type**, business rules for processing are assigned that include the following:

- Manager
- Required phases (e.g. Requisition, Award, etc.)
- Allowable Documents (e.g**. RQS**, **PO**, **RC**, **IN**, etc.)

A Performance Evaluation Template is assigned to each **Procurement Type**. This template determines the **Evaluation Criteria** to use when creating a **Performance Evaluation** (**PE**) document.

Certain **Cited Authorities** are only applicable to certain **Procurement Types**. When completing an Award Document it is important to select the **Procurement Type** first as this action will filter the list of **Cited Authorities** to show only those that are relevant.

Cited Authorities

In order for a purchase to be legally processed, the Commonwealth of Kentucky requires a Cited Authority to be associated with each award and each payment document. This Cited Authority contains statutory, regulatory or policy citations for a purchase. This information is required when creating award and payment documents.

Proper completion of the **Cited Authority** field is *required* for the Commonwealth of Kentucky to comply with an agency's pre-audit delegation agreement resulting from **FAP 120-13-00 (Decentralization of the Pre-Audit Function).**

Cited Authority represents the statutory, regulatory or policy citation – for example, "**FAP 145-11-00**".

Cited Authority is required on Award Documents, Payment Request and ABS Documents where there is no reference or only a memo reference to an award. **Cited Authority** is not required on Requisition or Solicitation documents.

The validation of the Cited Authority's minimum and maximum amount will occur at the document header level – the document amount and NOT the line amounts.

NOTE: The combination of **Document Department**, **Document Code**, **Procurement Type** and **Dollar Value** determine if a **Cited Authority** is applicable to the award document you are attempting to process.

3 - eMARS Procurement Document Sections

eMARS Procurement documents have a **Header** section and up to eight Detail Sections. The following paragraphs provide an overview of what each section is used for and the types of information that will be entered.

Document Sections

Header- The **Header** section lists general information associated with the entire document.

Vendor - The **Vendor** section provides Vendor information pertaining to:

- Suggested Vendors for providing the goods/services (Requisition phase documents)
- Vendor associated with a Solicitation Response (Solicitation and Evaluation phase documents)
- Vendor awarded a contract (Awards phase)

Vendors are selected from a pick list that is populated by the Vendor/Customer (**VCUST**) table.

Sub-Vendors- The **Sub-Vendors** section lists **Sub-Vendors** or Sub-Contractors associated with the procurement. Note that Commodity lines are not linked to the **Sub-Vendors**.

Commodity- The **Commodity** section lists all Commodities (goods or services) associated with the document. The Commonwealth will use a 5 digit Commodity Code allowing the user to provide more descriptive Commodity information.

Accounting Distribution- The **Accounting Distribution** section lists the fund distribution across multiple line items. This information allows for the distribution of commodity costs across multiple Accounting lines based on percentages.

Terms and Conditions- The **Terms and Conditions** section lists the **Terms and Conditions** associated with the document. The **Terms and Conditions** (**TRMC**) table is used to establish "pre-established" **Terms and Conditions** for selection on this detail section. **Terms and Conditions** defined on the **TRMC** table can include attachments that will be included in this detail section of the document. Users will be able to attach MS-Word documents in **.XML** format to be the **Terms and Conditions**. Users must have **Word2003** in order to attach modified documents to the **Terms and Conditions** component of the document.

Accounting- The **Accounting** section lists the accounting funds for each Commodity line.

Posting- The **Posting** Section lists the posting information for each Accounting line.

NOTE: As a general rule, for most procurement documents the components that you will navigate to are:

Header

Vendor (This is optional on **RQ** and **SO** document types)

Commodity

Accounting Distribution – While not required, this is a shortcut to populating funding

information when all commodity lines contain identical funding or mostly the same

funding elements

Terms and Conditions – On Solicitation and Award Documents

Accounting

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4 - Solicitation Process

The Personal Services process begins with the Request for Proposal (**RFP**) document. The Solicitation document is used to define the requirements/specifications for the services being requested and the **Terms and Conditions** for doing business with the Commonwealth.

When the Solicitation is submitted to Final status, eMARS will build a Bid Package for Vendors, send an e-mail notification to Vendors who are registered for the listed Commodities and who are listed in the Free Form Vendor list, and transmit the bid package to the Vendor Self-Service (**VSS**) web-site from which it may be downloaded.

Solicitation Documents

There are several types of Solicitations documents that perform similar but slightly different business functions. Please use the following table as a guideline for when to use each:

Solicitation Document Code	Business Use
RFB (Request for Bid)	Used for Procurements where the Commodities for goods/services are delineated (Central Use Only).
RFP (Request for Proposal)	Used to propagate procurements that may not have exact parameters. May or may not be commodity driven.
RFQ (Request for Quotations)	Used by departments for competitive bidding opportunities under a department's three quote limit for non-professional services.
RFI (Request for Information)	Used to gather information when a conceptual need has been identified, but the detailed requirements needed to achieve the goal need to be defined.
BAFO (Best and Final Offer)	Second round of **RFP**. Selected respondents are provided the opportunity to alter their original response to reflect their best and final offer for the Solicitation.
RA (Reverse Auction)	Solicitation used to generate a Reverse Auction. Vendors must be pre-registered to participate. All Vendors can see the lowest bid.

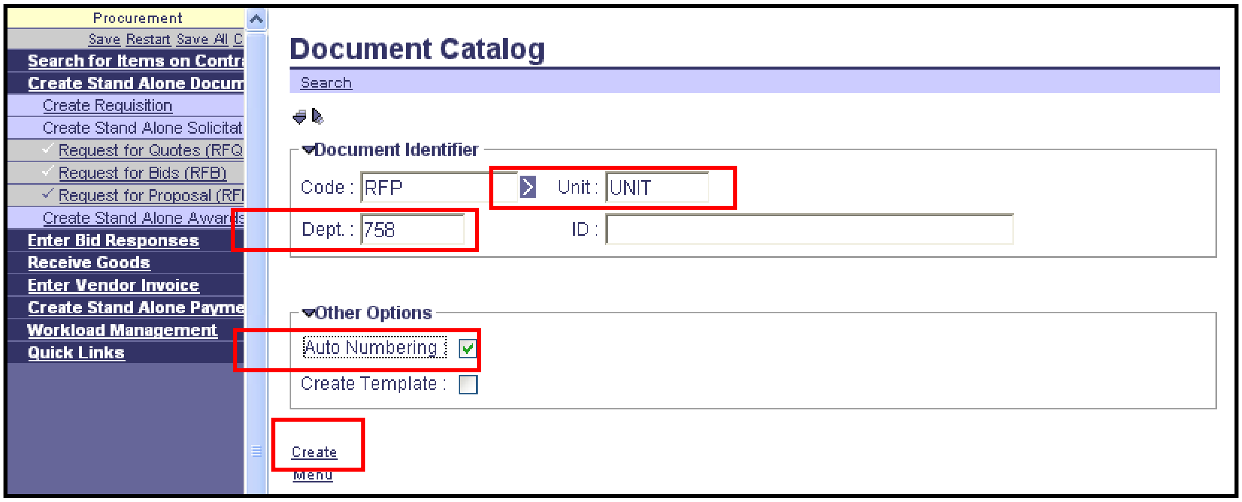
Solicitation documents may be created in one of three ways:

1. Directly from your **Procurement Workspace** not referencing any Requisition;
2. By **Copying Forward** from a Requisition (**RQS**) submitted by a department;
3. By **Copying Forward** from a Solicitation into a Best and Final Offer (**BAFO**) document.

Create a Solicitation

Access your **Procurement Workspace** and click the **Create Standalone Document** link in the Secondary Navigation Panel. Expand the **Create Standalone Solicitation** section. Click **Request For Proposal (RFP)**. The Document Catalog will open.

Click **Create** to switch into create mode.

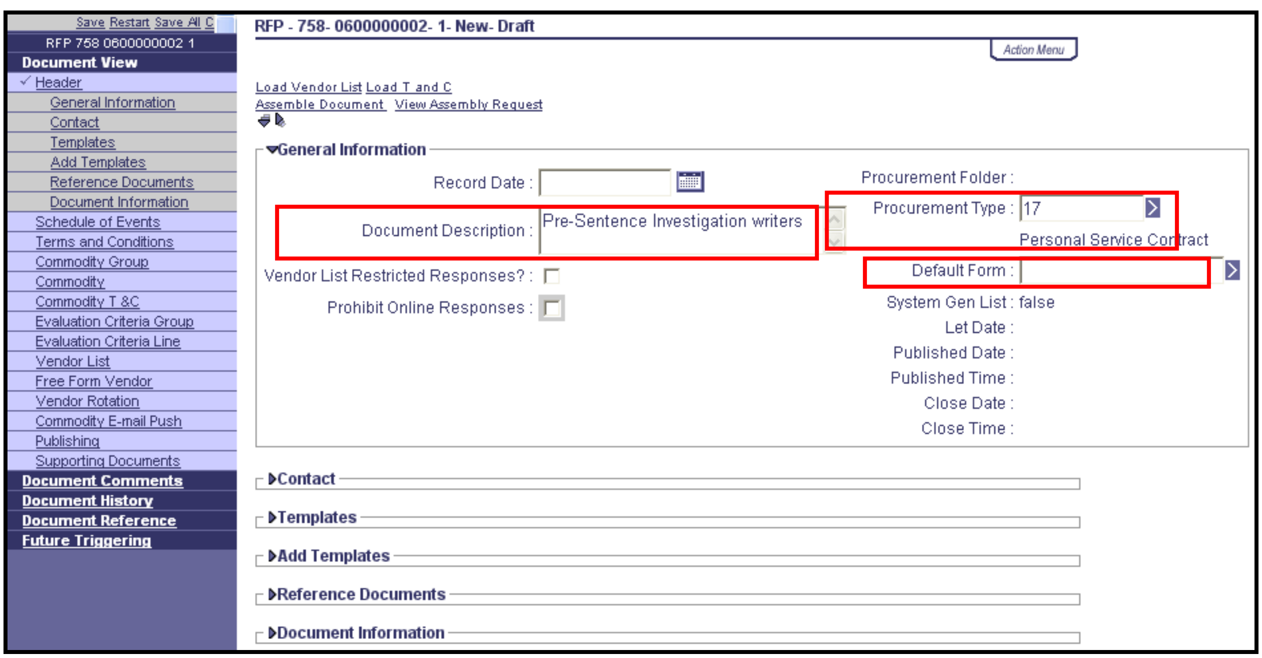


Enter your document **Department Code** and **Unit Code** into their respective fields.

Click **Auto Numbering.**

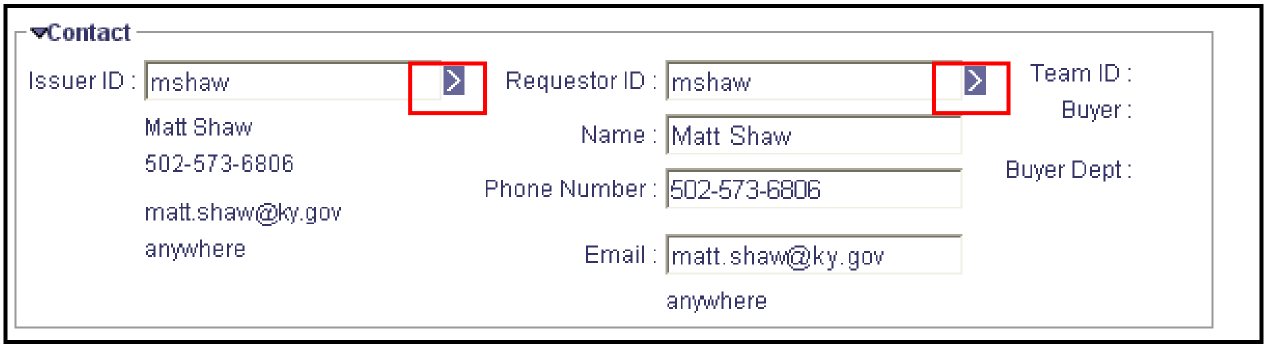
Click **Create** to create the **RFP** document. The document opens to the **Header** page.

Complete the required fields in the Solicitation document header.



- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.
- eMARS uses the **Default Form** field during the assembly process to determine the lay-out of the assembled Solicitation. Kentucky will only be using one Form so leave this field blank and the correct Form will default when the document is submitted.

Complete the **Contact** section



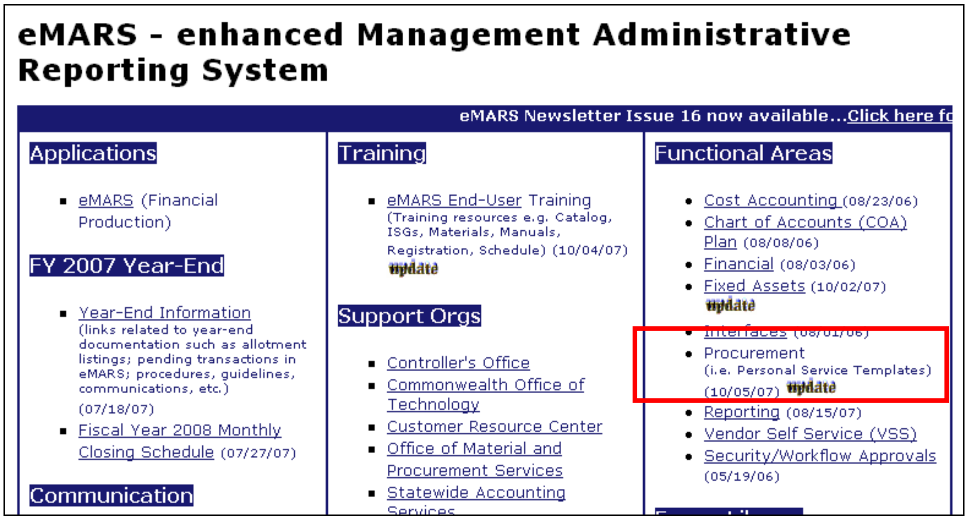
- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and needs to be completed. The **Requesting ID** field is used to identify for whom the goods or services are being requested, (e.g. who will actually be using the items or services detailed on the Solicitation). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

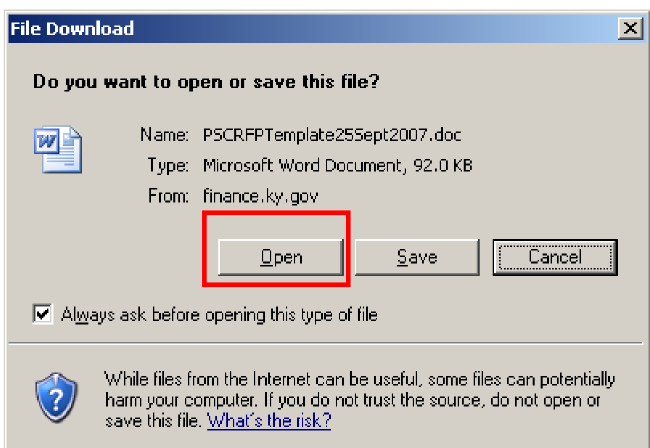
Complete the **Terms and Conditions** component. Terms and Conditions are created by attaching a Word Document, saved as **.XML** to the Terms and Conditions section of the Request for Proposal. The Office of Procurement Services (**OPS**) has developed a Terms and Conditions template for all Request for Proposal documents. A template exists for a Standard Professional Services RFP as well as a template designated for Legal Services. Both of these templates are located on the eMARS and the Office of Procurement Services websites. Each template contains the required information that must be incorporated in the Terms and Conditions sections and allows for users to make changes to areas of the template to be agency specific.

Users will need to download a copy of the desired RFP template from the website and modify **only** the highlighted portions of the template to make it specific to the agency. Once the changes have been made to the template the document will need to be saved as **.XML** and uploaded as a **Free Form** Attachment to the Terms and Conditions section of the document.

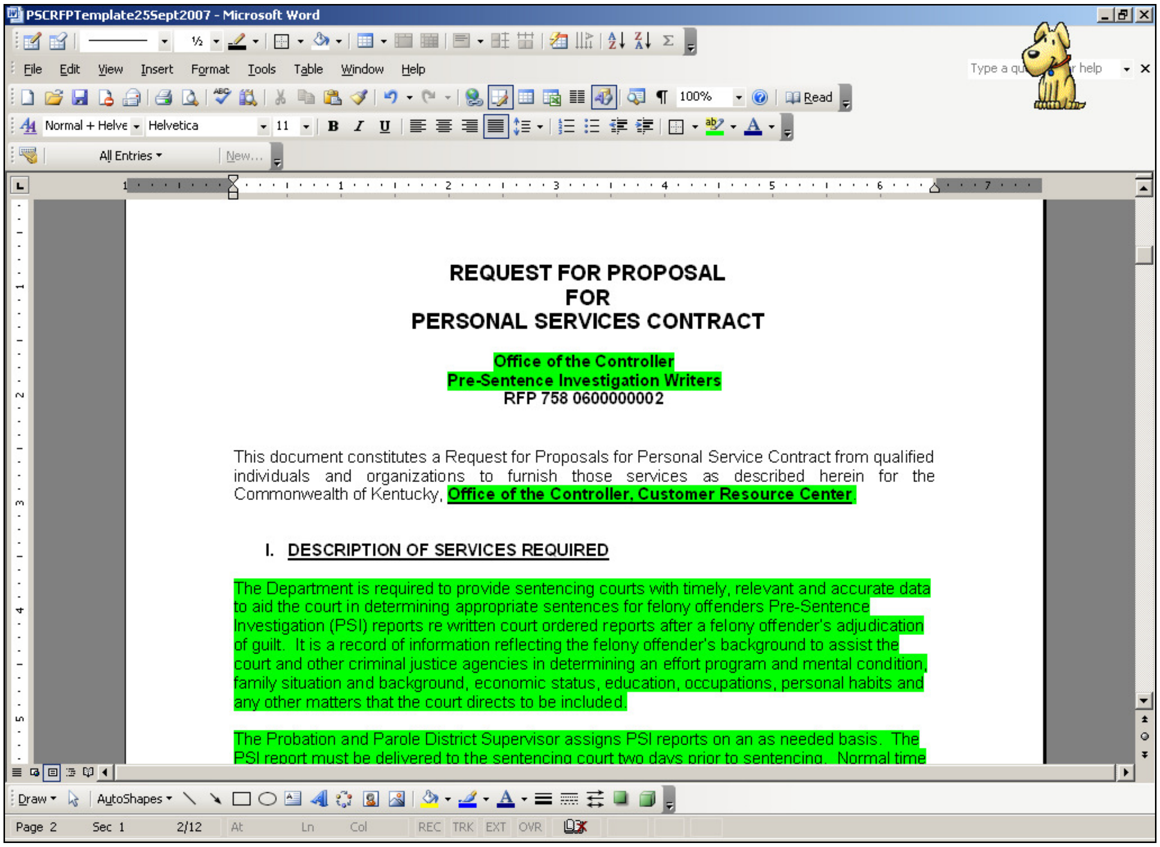
Please follow these steps to select a standard **Terms and Conditions** and modify

a. Navigate to the Procurement Functional area of the eMARS website and Open a copy of the desired template that will need to be modified.



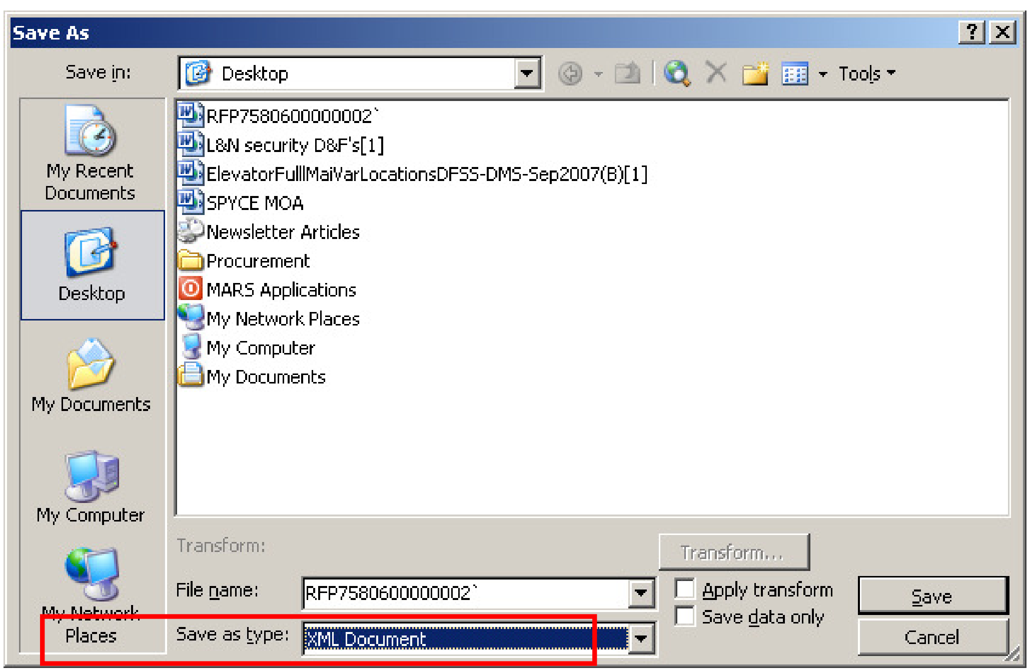


b. Modify <u>*only the highlighted sections*</u> of the document to make it specific to the agency and the RFP. Make sure that you delete the instructions found on page one and remove all highlighting in the template before uploading into eMARS.



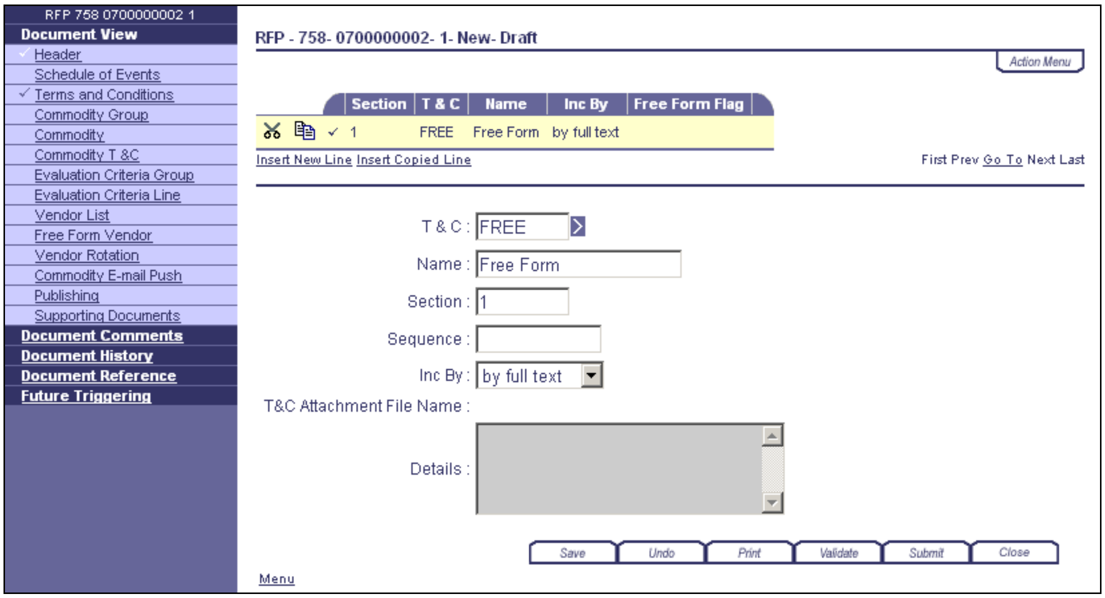
c. Remove all highlighting from the document.

d. Save the document to your local desktop as **.XML**

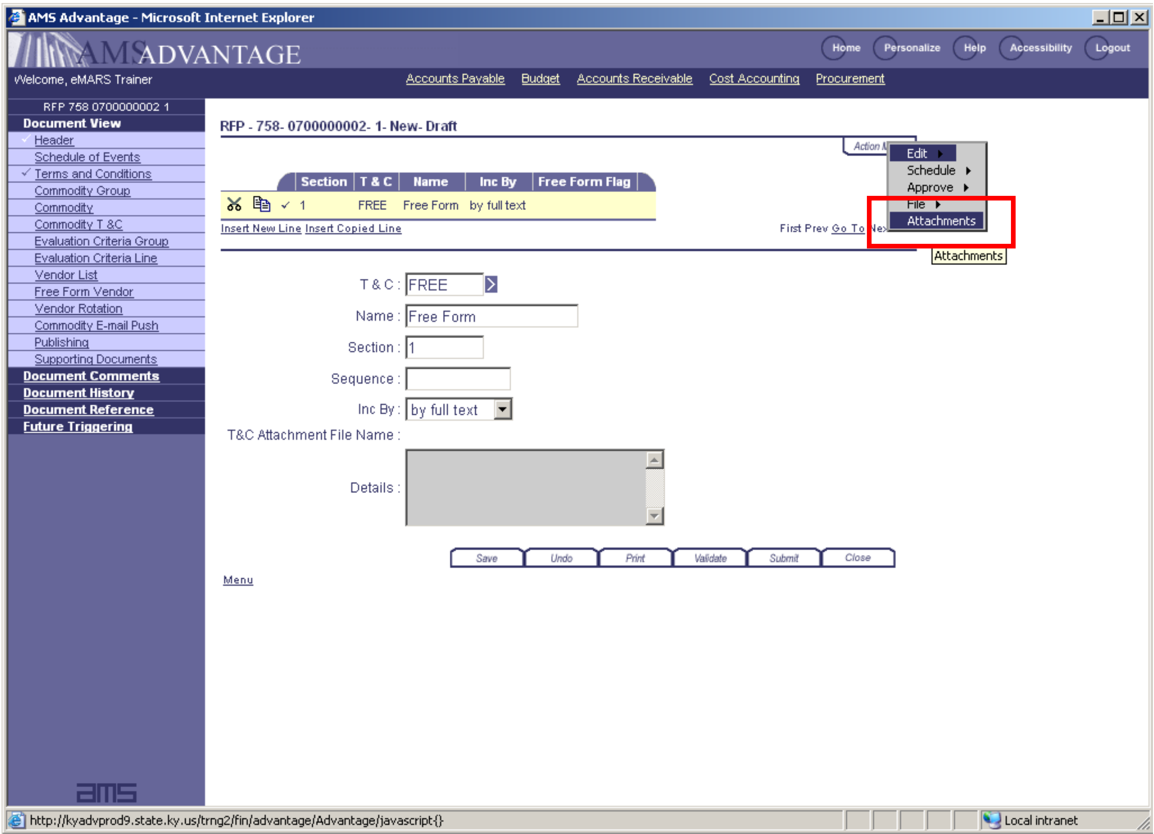


e. Navigate to the **Terms and Conditions** section of the RFP and click Insert New Line. When the record has been added click on the **arrow** next to the T & C field and select the **Free Form** from the pick list.

> NOTE: By selecting the Free Form Terms and Conditions the system allows you to attach your own **.XML** document to your **RFP** rather than a system standard. When the Free Form Template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions.

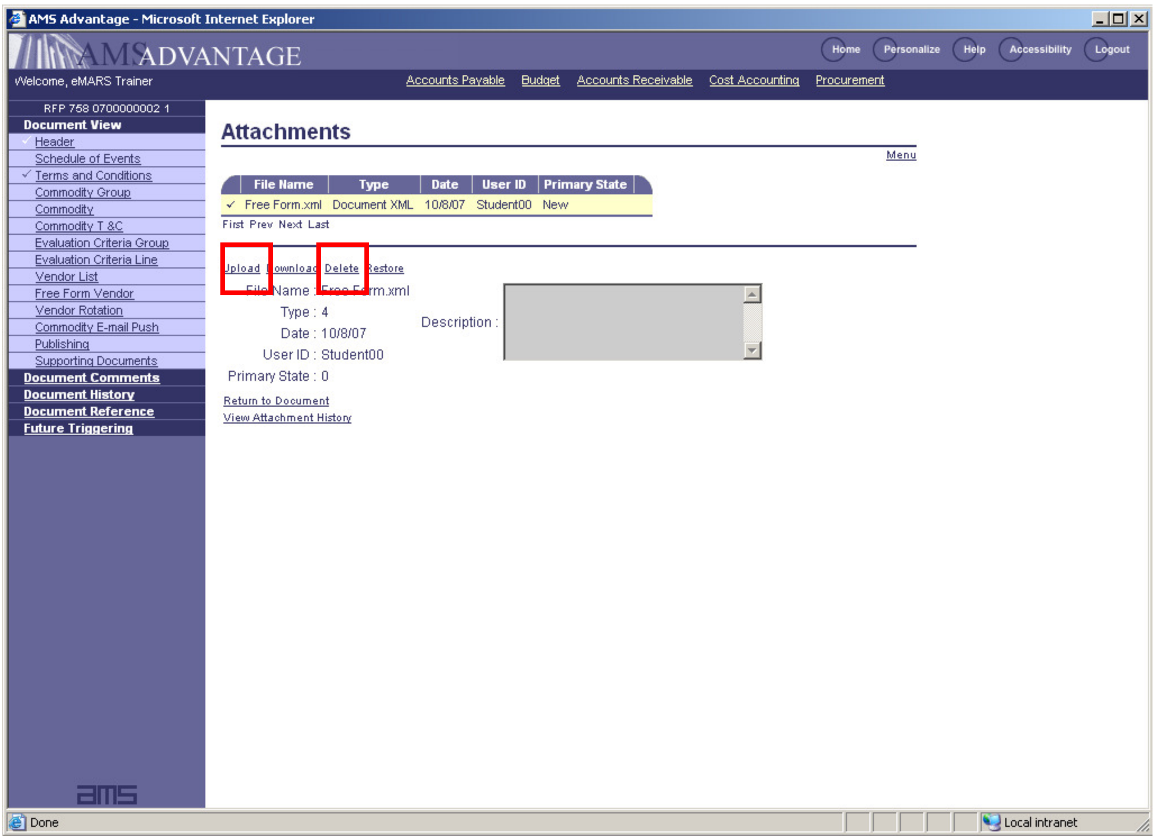


f. Click the **Attachments** link from the **Action Menu**. This will allow you to attach your copy of the **RFP** template that you created in step B.



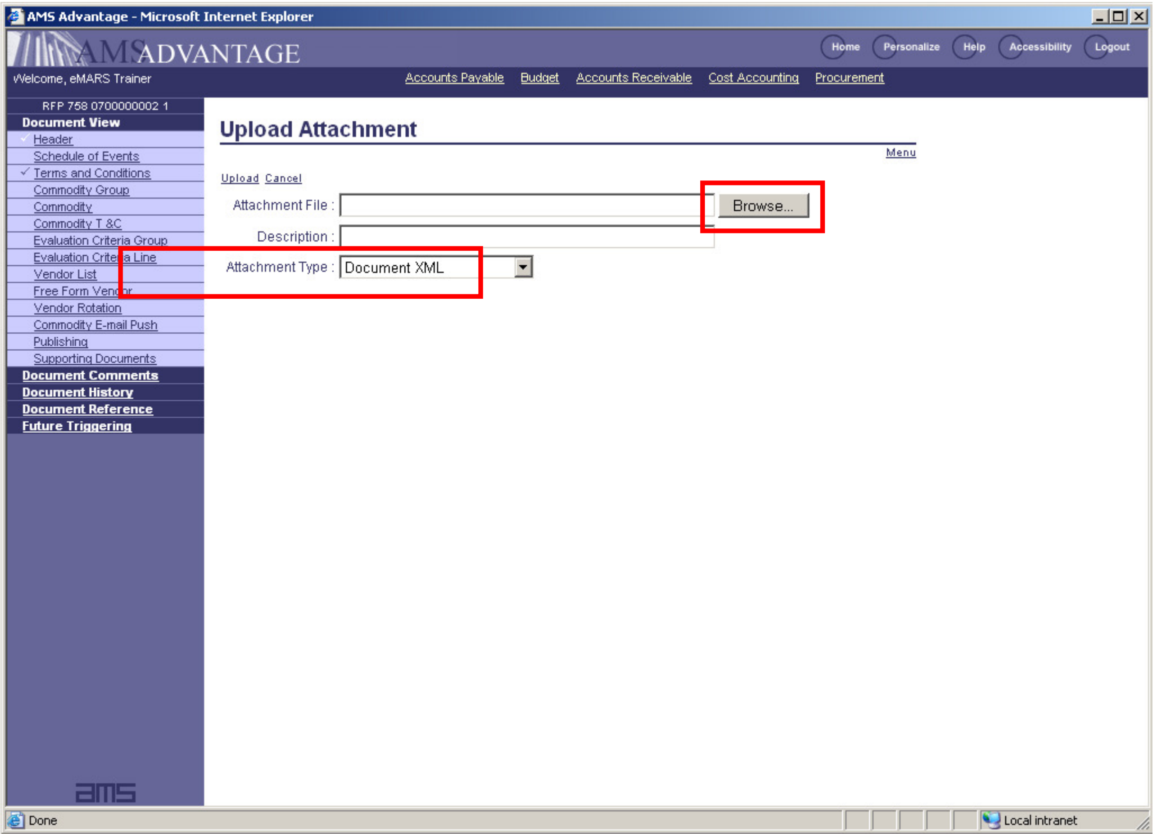
g. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when Free Form was selected from the T & C picklist. Once the Free Form attachment has been deleted click **Upload** to attach your template.

NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.

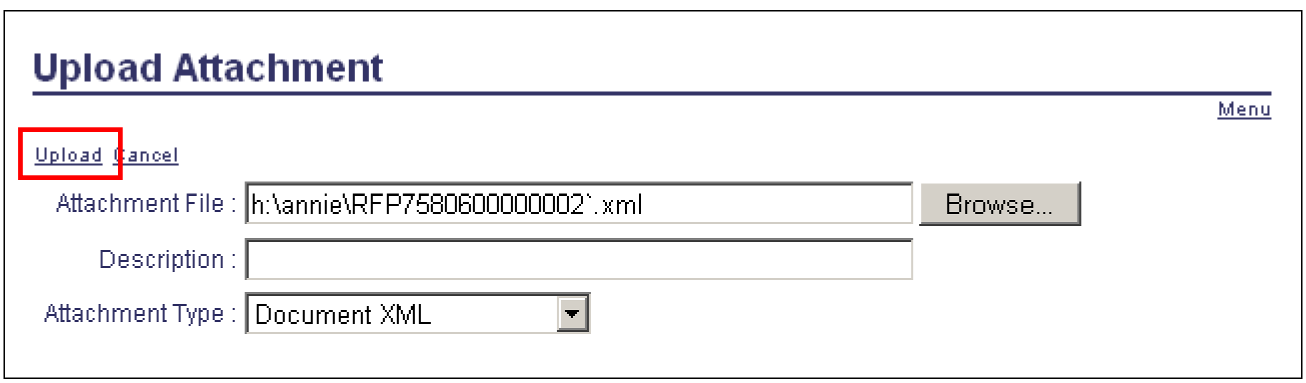


h. Browse your local hard drive for the **RFP** Template that has been saved as an **XML** document.

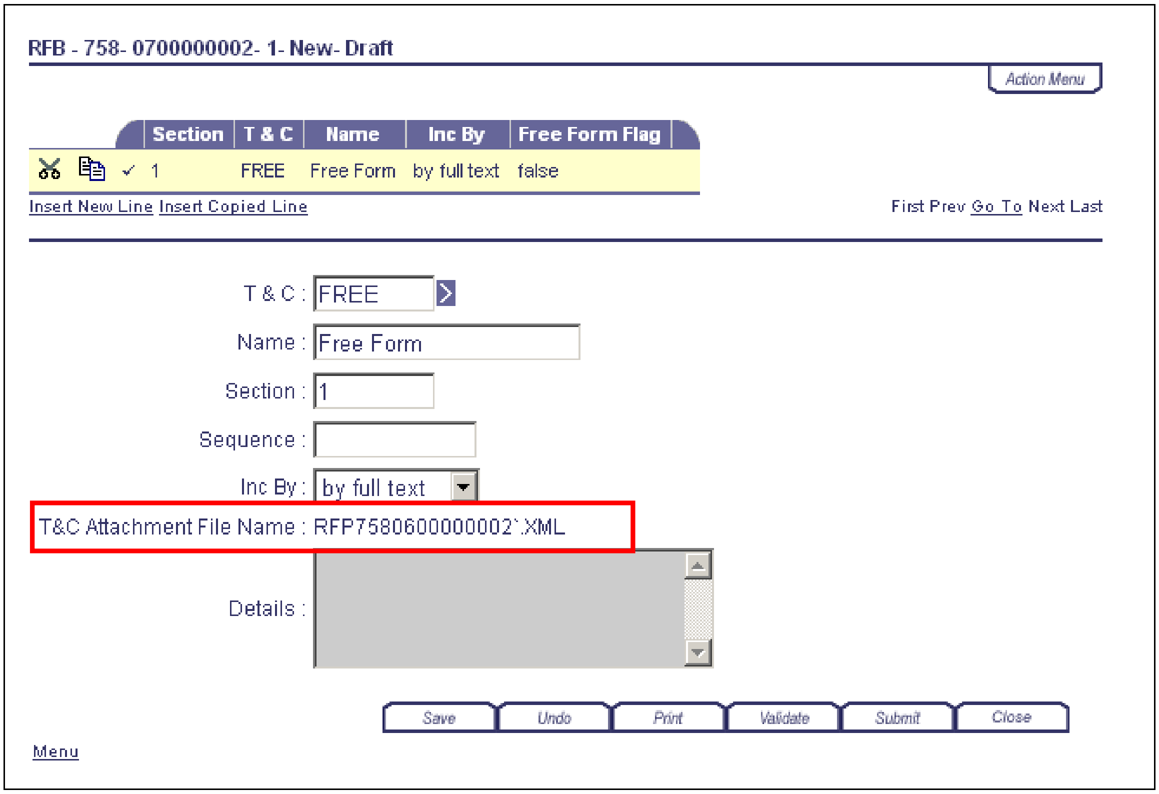
NOTE: Make sure that the Attachment Type of Document **XML** is selected.



i. Once you have located and selected the file, click **Upload.**

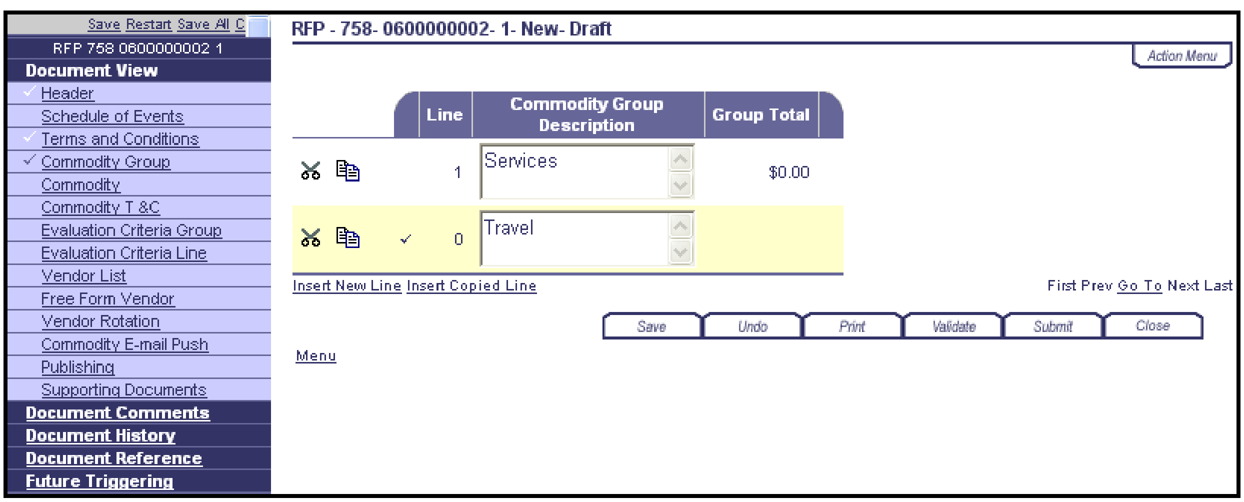


j. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the Terms and Conditions section of the RFP. Once there you will notice that the **T & C Attachment File** name has changed to your new file. eMARS will use this new file in the bid package/print out.



Create **Commodity Groups**. Commodity Groups are used to group Commodity lines together for organizational and evaluation purposes. The Evaluation Document (**EV**) allows you to award at the Commodity Group level. The Evaluation Spread-sheet will show the lowest bidder by Commodity Group. You must click **Insert New Line** to add a new group.

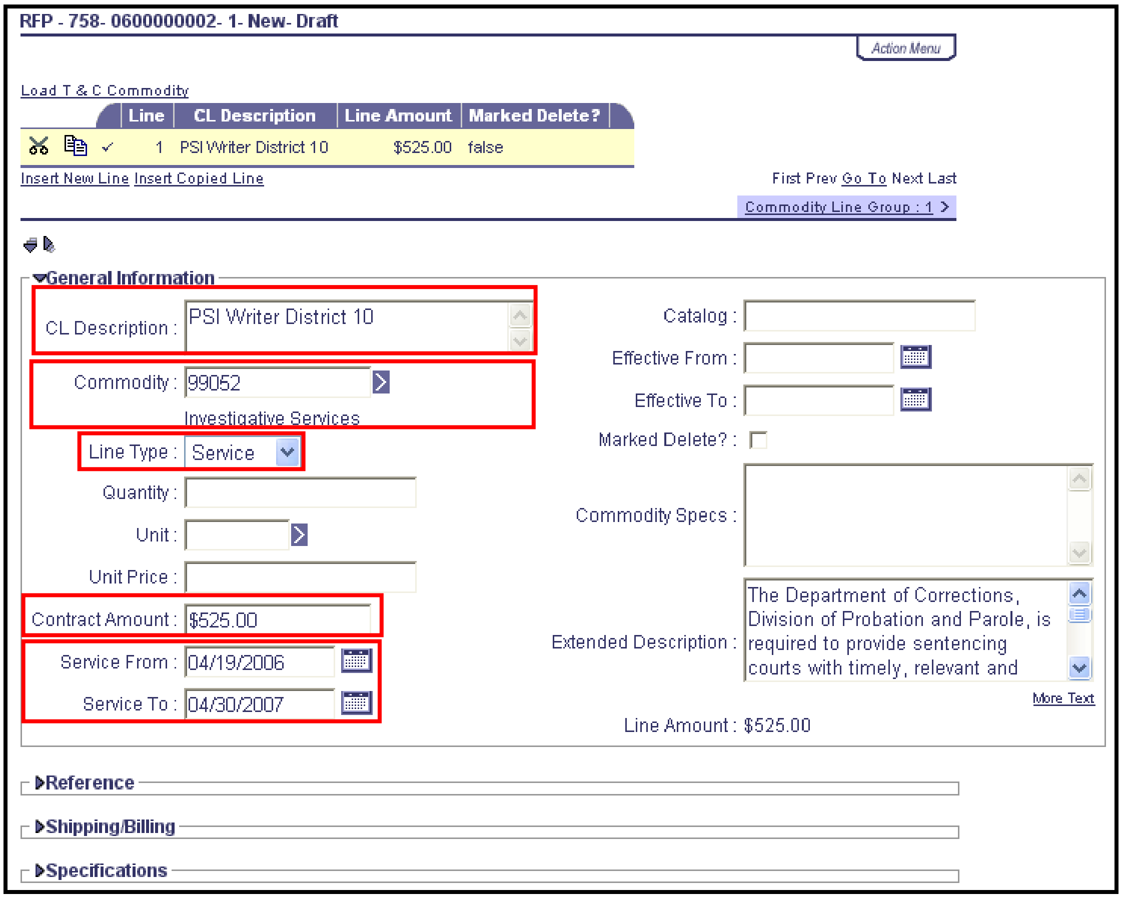
NOTE: A default group will always be created.



The **Commodity Group Description** field is used to record the name of the Group. This field can be modified to rename the Group.

NOTE: To view the Commodity lines associated with a given **Commodity Group** you must select the Group in the **Commodity Group** grid section and then transition to the Commodity panel by clicking on the **Commodity** link in the Secondary Navigation Panel

Click on **Commodity** from the Secondary Navigation Panel. The **Commodity** section of the Solicitation is used to list all distinct goods or services being requested. Complete the required fields for the **General Information** section.



- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the **Commodity** section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the five digit NIGP **Commodity Code** that most closely matches the item or service being purchased. This field is used primarily for classification purposes. When creating a Solicitation it is important to make the first Commodity line the one that is most relevant to the Solicitation as a whole. The first Commodity Code is used to determine which office will receive the Solicitation for processing.

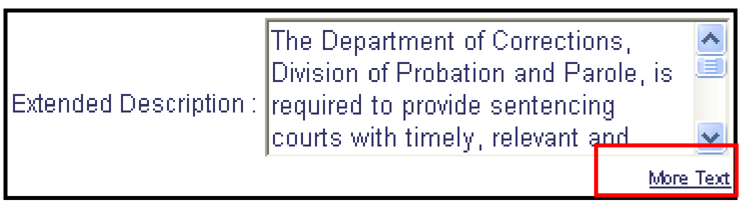
- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price.** Services should be entered as **Contract Amount** with **Service From** and **Service To** dates. For **RFPs** that will result in a **PSC**/**MOA** please only select a line type of **Service.**
  - When you know the **Unit Price** a Line Type of "**ITEM**" should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required.
  - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a **Line Type** of "**Service**" should be selected. When the **Line Type** is Service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.

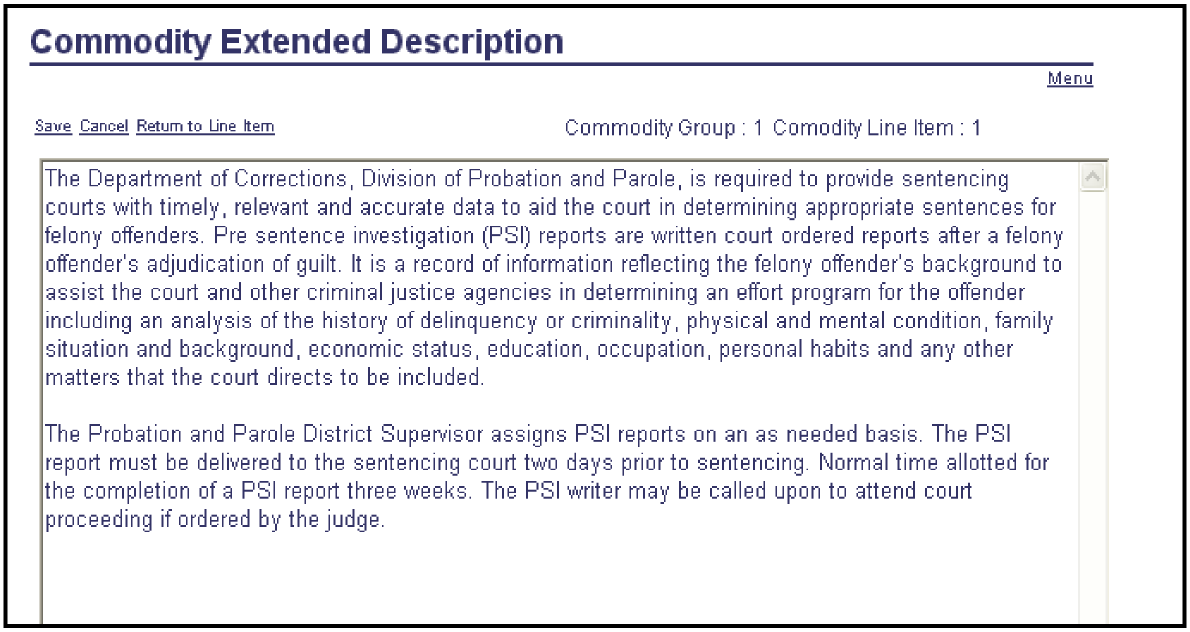
NOTE: If the resultant award will be paid from the **UPPS** payroll system- you must select a **Line Type** of service and provide a **Contract Amount**.

- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the **Extended Description** click on the **More Text** link.

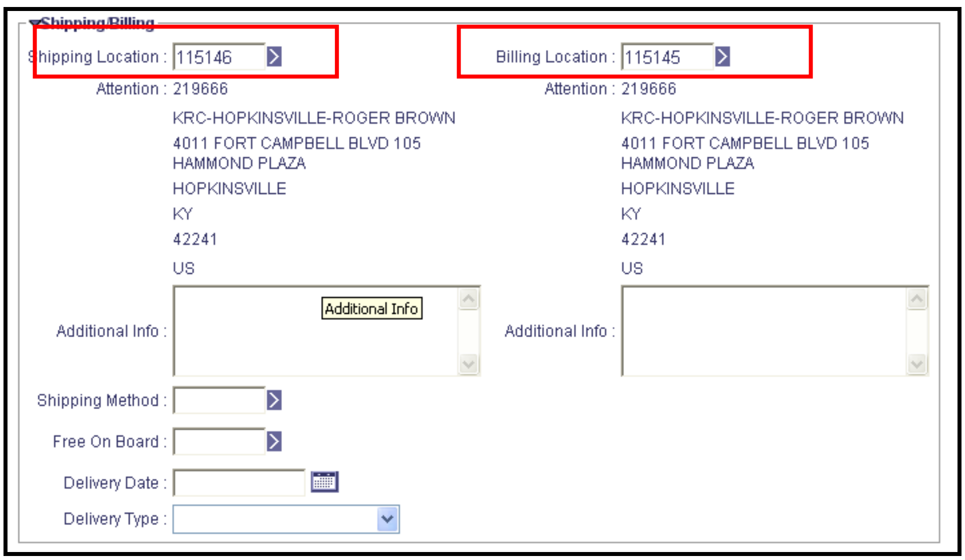
NOTE: To insert a TAB into the **Extended Description** field the user must type [**Ctrl**] + [**Tab**].

NOTE: The user may copy a description from MS-Word or another word processing format and paste into this field using [**Ctrl**] + [**C**]/[**Ctrl**] + [**V**]





Complete the **Shipping**/**Billing** Information section.



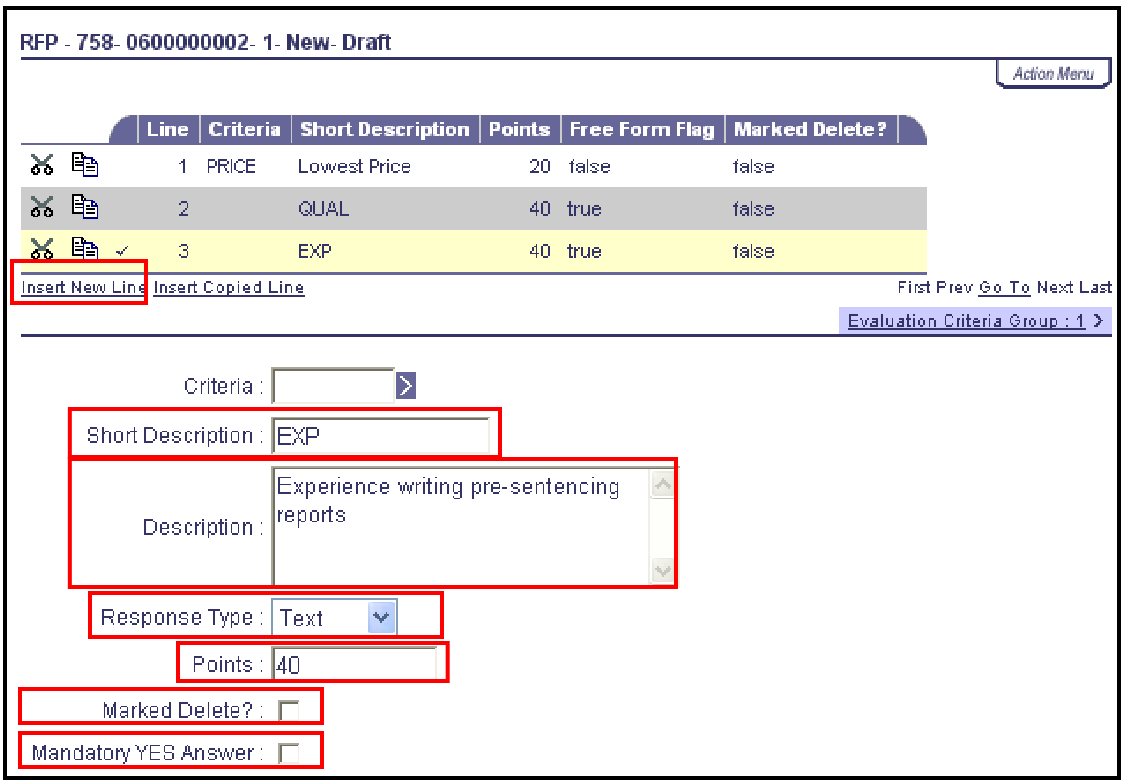
- The **Shipping Location** field is used to identify where the goods should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table. For **RFPs** the **Shipping Location** field is not required.
- The **Billing Location** field is used to identify to where the Vendor's Invoice should be mailed. To select a **Billing Location** click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you

may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board, Shipping Additional Info, Billing Additional Info** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

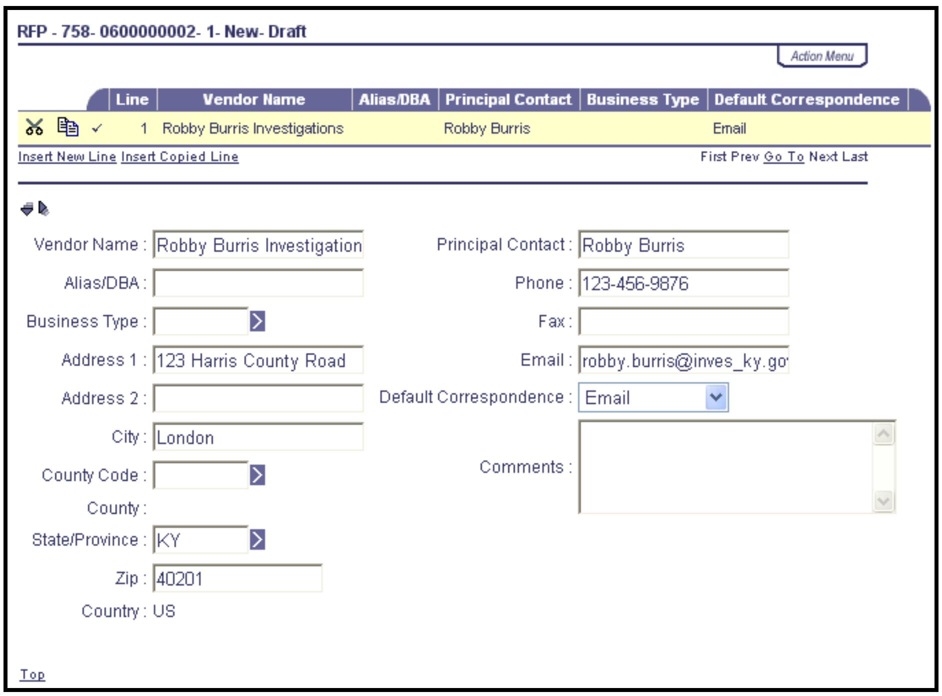
Click **Evaluation Criteria Line** from the Secondary Navigation Panel to create the **Evaluation Criteria** for this Solicitation. This section allows you to define specific considerations for evaluating responses, and apply a point value for each.



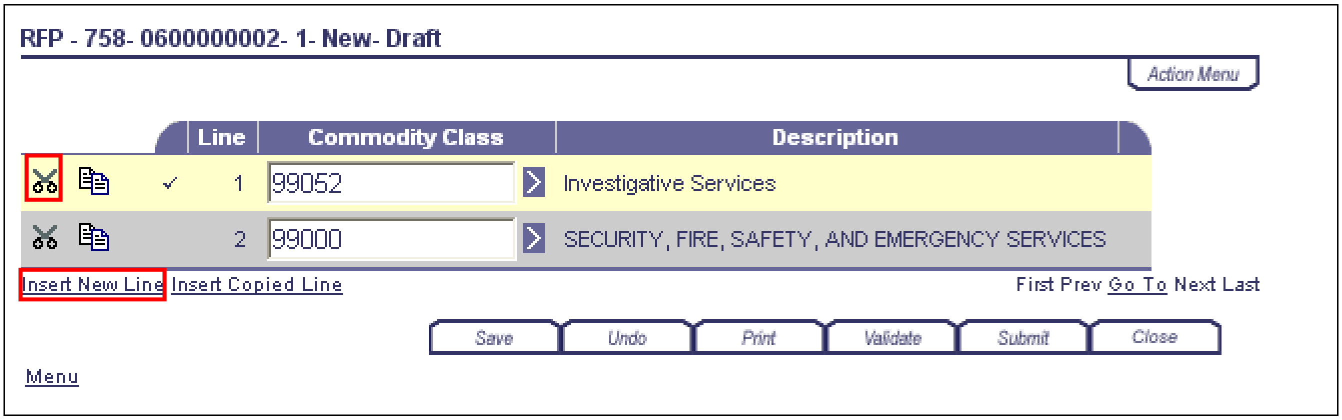
- The **Criteria** pick list allows you to select a pre-defined **Evaluation Criteria** from the eMARS database. If you would like to create your **Evaluation Criteria** this field may be left blank.
- Use the **Short Description** / **Description** field to describe the **Evaluation Criteria**. These fields will be populated if a pre-defined **Evaluation Criteria** has been used. Can also be used to create new Elavuation Criteria that is not part of the Criteria Pick List above.
- The **Response Type** field is used to determine the format of the response required from Vendors. Possible choices are: Text, Number, Yes/No, Date, and None.

- The **Points** field is used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award.
- The **Marked Delete?** Check-box is used on Solicitation modifications to signify that the **Evaluation Criteria** is no longer part of the Solicitation.
- The **Mandatory YES Answer** check-box is used to require the Vendor to answer "Yes" to **Evaluation Criteria** that have been set-up with a **Response Type** of Yes/No. Solicitation Response documents with a "No" answer to a Mandatory **Evaluation Criteria** may not be submitted.

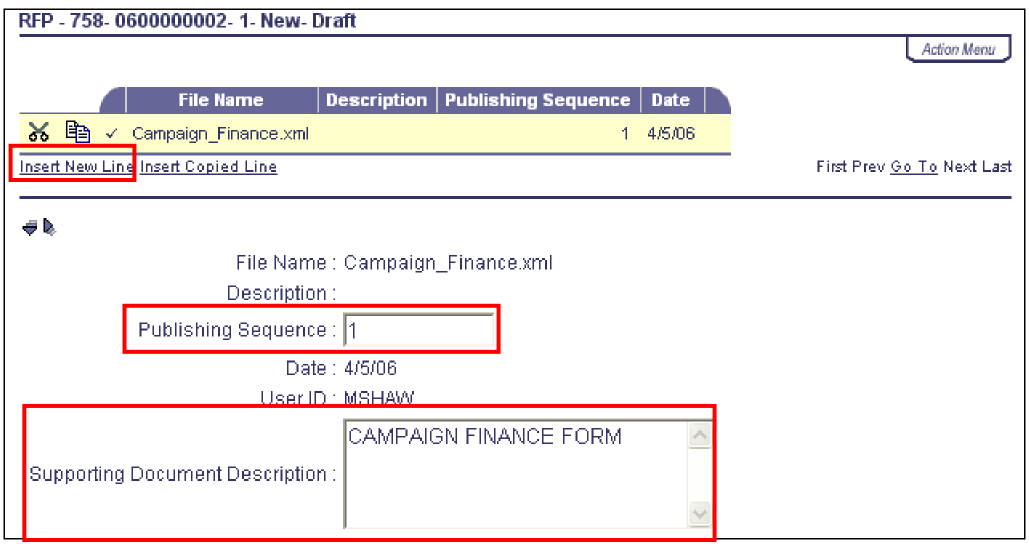
Click **Free Form Vendor** from the Secondary Navigation Panel to create the **Free-Form Vendor** list. The **Free-Form** Vendor list is used to ensure that Vendors identified here will receive email notification of the solicitation once it has been posted to the Vendor Self Service website.



Click **Commodity E-mail Push** link in the Secondary Navigation Panel. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated when the document is populated based on the Commodity codes identified in the **Commodity** section. You may also add and delete Commodity codes if necessary.

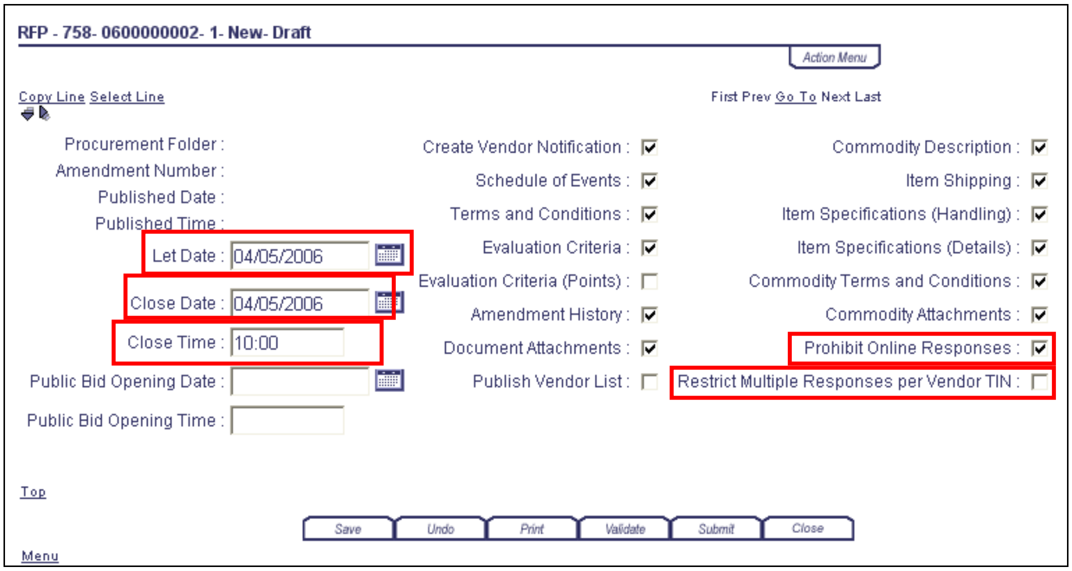


Complete the **Supporting Document** section. This section allows you to view and attach files relevant to the entire document, for example, a Statement of Work or other Supporting Documents. Documents in the **Supporting Document** section will be included in the Assembled Solicitation document. Documents in this section *must* be in MS-Word **XML** format. **Supporting Documents** will be placed in the Bid Package after all **Terms and Conditions**. **Supporting Documents** will be ordered within the package by the **Publishing Sequence** field.



- The **Publishing Sequence** field is a numeric value which allows you to establish the display order for the attachments on the assembled Adobe Acrobat **.PDF** file. This field is required. When the document is validated, the system performs data validation to ensure that the sequence value is sequential and that it has not been duplicated on other records.
- The **Supporting Document Description** field is used to describe the nature of the attached document. This value does not print and is for reference only.

Complete the **Publishing** Section. The **Publishing** Section is where you establish the **Close Date** and **Close Time**; whether or not to allow on-line bidding; and what elements will appear in the Vendor Self Service (**VSS**) rendering of the Solicitation.



- The **Let Date** is the day the Solicitation is to be published. (Required)
- The **Close Date** is the date after which Bids/Responses will no longer be accepted from Vendors (Required).
- The **Close Time** is the Time on the **Close Date** after which Bids/Quotes/Responses will no longer be accepted from Vendors (Required).

NOTE: The Closing Time must be supplied in 24hr military time (e.g. 9:30am=09:30, 2:00pm=14:00).

- **Public Bid Opening Date/Time**: These fields may be used to specify the time at which bids will be read to the general public. The time must be supplied in 24hr military time. (Optional)
- If the **Prohibit Online Responses** flag is not selected, then online responses via **VSS** are allowed. All Solicitations, regardless of the **Prohibit Online Responses** field setting, will be posted to **VSS** when the AMS eMARS Financial/VSS Synchronization process is run.

NOTE: Solicitation Modifications: Once a Solicitation has been finalized, the Buyer can allow online responses to that Solicitation if they were originally prohibited but the Buyer cannot prohibit online responses to that Solicitation if they were originally allowed.

- If **Restrict Multiple Responses per Vendor TIN** flag is selected, then only one response per Vendor **TIN** is allowed. If this flag is not selected, then more than one response per Vendor Taxpayer Identification Number (**TIN**) is allowed. This flag applies to responses entered through Vendor Self Service (**VSS**) and the Solicitation Response (**SR**) document.

NOTE: This flag **cannot** be changed during a modification of a submitted Solicitation document.

Click **Validate** to check for errors.

To Assemble:

1. From the **Header** Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

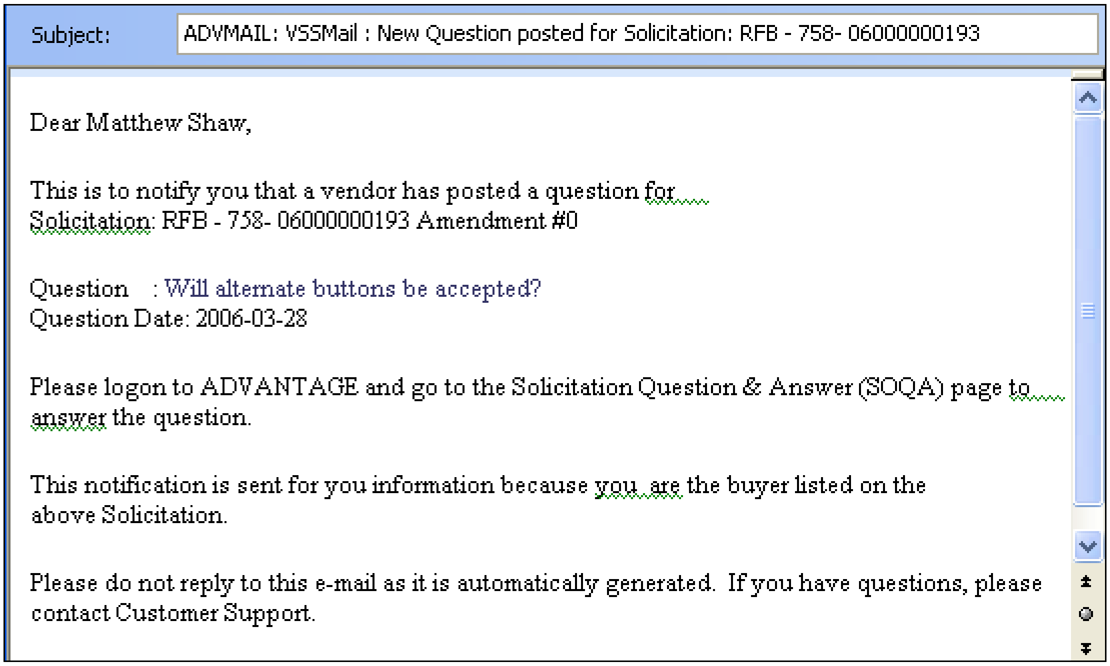
To Print the Assembled Form:

1. Return to **Header**
2. From the **Action Menu**, select **Attachments**.
3. Click **Download**.
4. While the **PDF** document is open use the **File Menu** Options to either print or email the document.

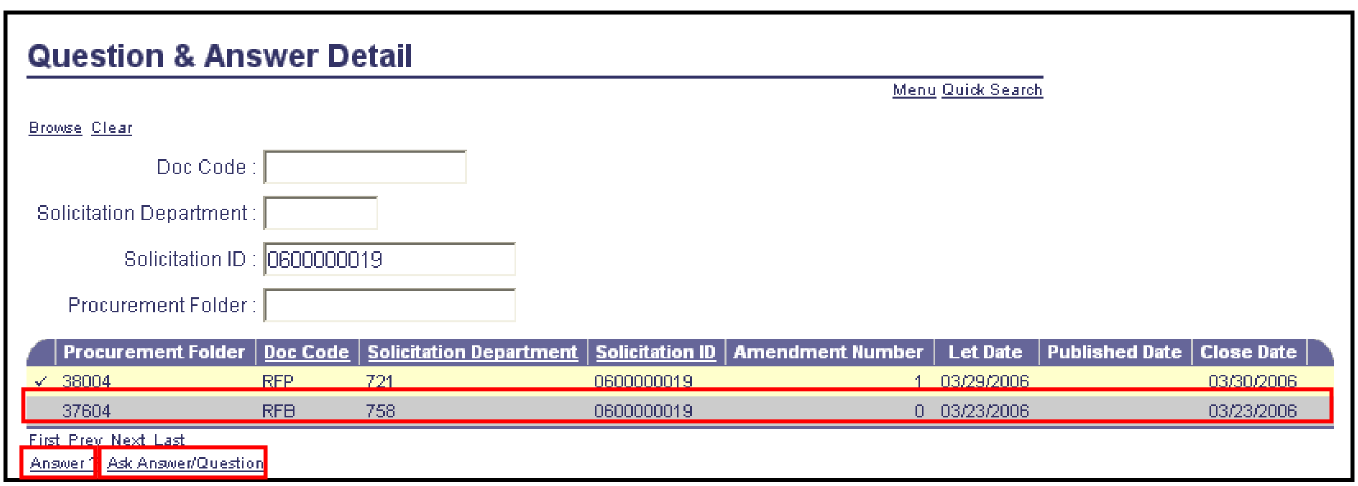
Submit the document to initiate workflow for approval.

There are additional steps during the Solicitation Response phase:

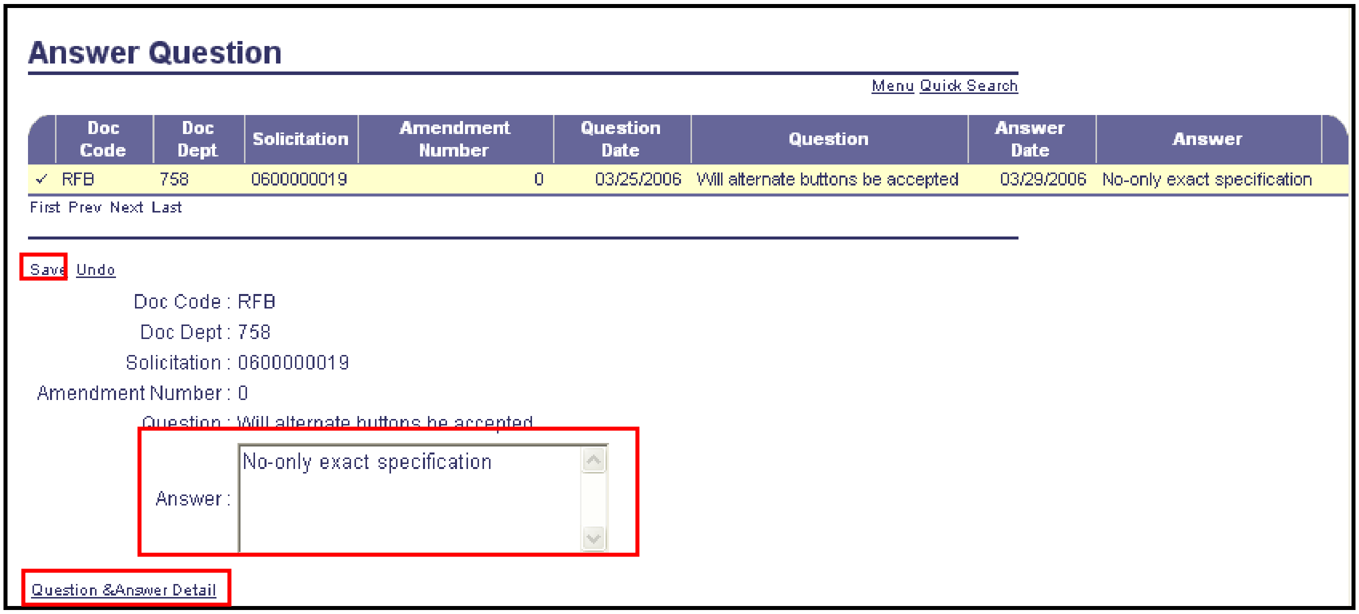
Post/Monitor Questions that are submitted through Kentucky Vendor Self Service (**VSS**). When the Solicitation is posted to **VSS**, Vendors have the ability to ask questions about the Solicitation that will be automatically routed to you via e-mail.



When you receive the e-mail you must access the **Solicitation Question and Answers** (**SOQA**) table from **Page Search**. Search for the Solicitation by entering the **Doc Code**, **Solicitation Department** and **Solicitation ID** and clicking the **Browse** link. Select the row from the grid section that corresponds to your Solicitation and click the **Answer** link to respond to a vendor's question. To post a Question and Answer received Off-line (FAX, phone) select the row in the grid and click the **Ask Answer /Question** link.



Click the **<u>Answer</u>** link to transition to the **Answer** page where you may respond to Questions submitted through **VSS**.

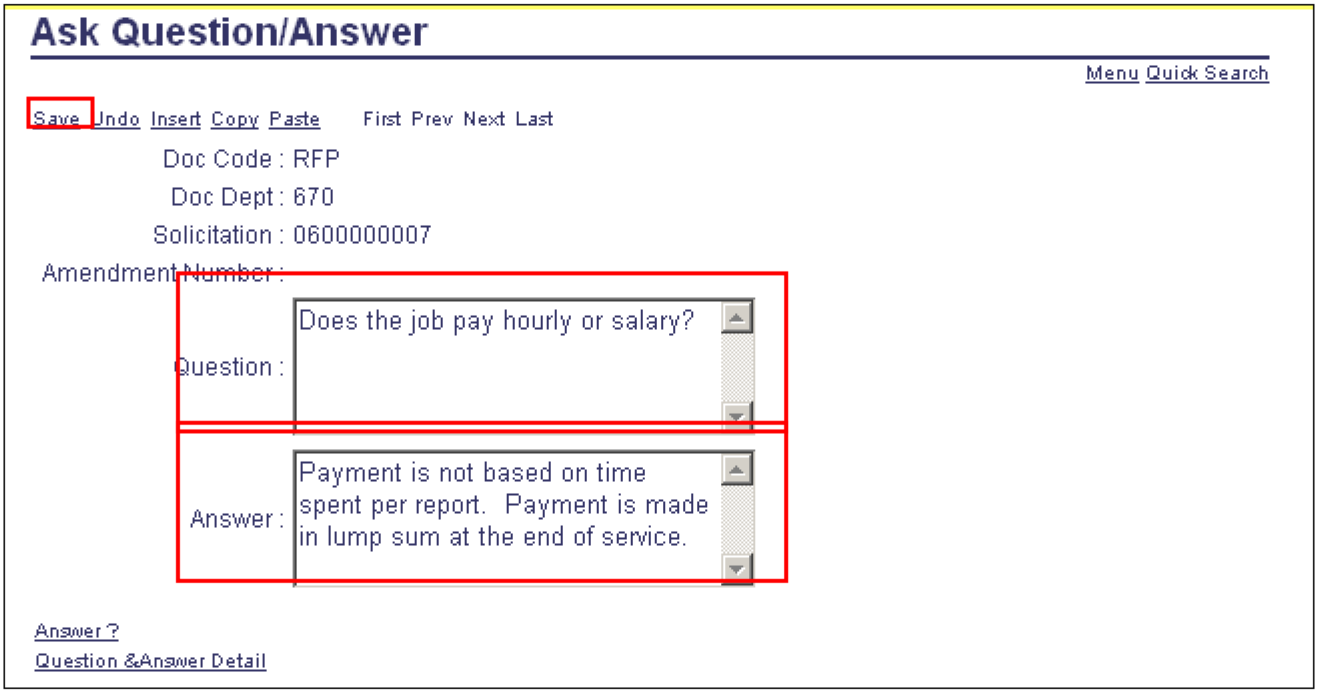


- Enter your answer to the Vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the public record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Clicking the **<u>Question & Answer Detail</u>** link will transition you back to the first page where you selected the Solicitation.

Post a Question and Answer received through other means: e-mail, phone, FAX etc. From the **Question and Answer Detail** page search for and Select the Solicitation for which you wish to post a Question and Answer and click the **<u>Ask/Answer Question</u>** link.



- The **Question** field allows you to enter the question received from the Vendor. Please enter the Question exactly as received from the Vendor.
- Enter your answer to the Vendor's question in the **Answer** field. You may enter up-to 250 characters of text.

NOTE: Your answer will become part of the Public Record and will be posted to the internet! Please consider typing your answer into MS-Word for spell check and then copying the text into the **Answer** field.

- Click the **Save** link to post your response to **VSS**. It will be available for the public viewing after the next **VSS** synchronization.

It is also encouraged that you include any Questions and Answers in the Terms and Conditions of the Solicitation as well. This will allow all questions/answers that are posed to the buyer to post to the Vendor Self Service for all Vendors to see. To include the Questions and Answers in the Solicitation, the buyer will need to create a modification to the solicitation and modify the Terms and Conditions Template that has been attached to the Terms and Conditions section of the Solicitation. The Questions and Answers should be added to the beginning of the Terms and Conditions Template and should identify the Date, Modification Number, the Reason of the Modifications and all Questions and Answers. Once these changes have been added to the XML document it will need to be saved to your desktop and Uploaded in the Terms and Conditions section through the Action Menu. The previous attachment will need to be deleted and the new attachment with the Questions and Answers will need to be added in its place.

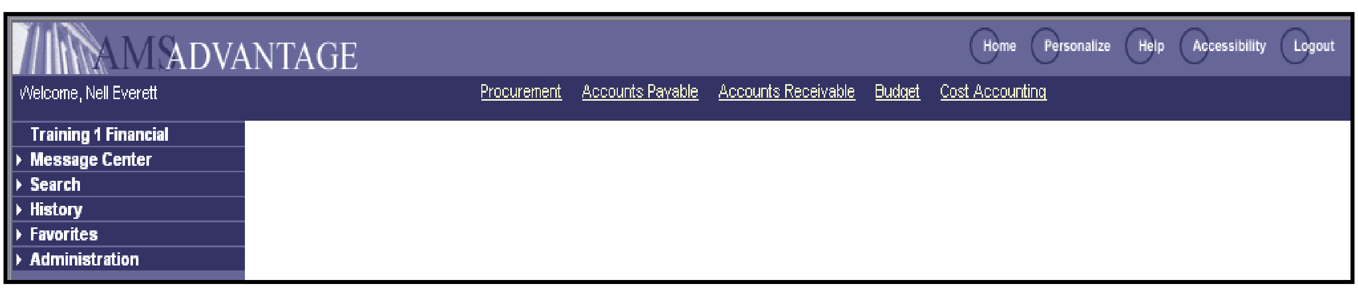
Exercises – Logging In to eMARS

You will use a Student ID to access the training database during class. These IDs are only set up for the training environment. Your User ID for the production environment will be assigned along with a new password when eMARS is implemented.

From the Login page, enter the following information:

Required Fields	Values
User Name	Enter your Student ID from your student card. **NOTE: User Names are case sensitive.**
Password	Enter your Password from the student card and click **Login**. **NOTE: Passwords are case sensitive.**

The Home Page appears.



Exercise 1 – Create a Solicitation (RFP) document from your Procurement Workspace

Scenario

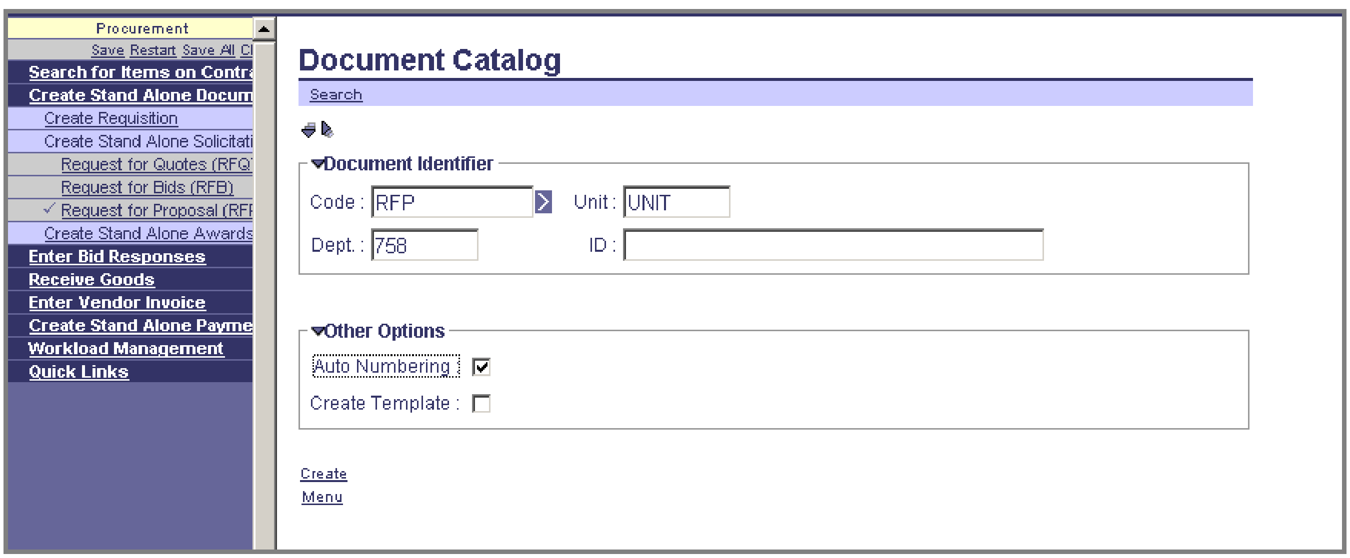
You need to initiate a Request for Proposal (**RFP**) Process for Pre-Sentencing Investigation Services for the Department of Corrections.

Task Overview

You will create an **RFP** from your **Procurement Workspace**. On the **RFP** you will add custom **Terms and Conditions**, build a **Free Form Vendor List**, build a list of the **Commodities** being solicited and set the **Publishing Dates**.

Procedures

1. Access your **Procurement Workspace** and click **Create Standalone Document** in the Secondary Navigation Panel.
2. Expand the **Create Standalone Solicitation** section. Click **Request For Proposal (RFP)**. The Document Catalog opens.
3. Click **Create**.

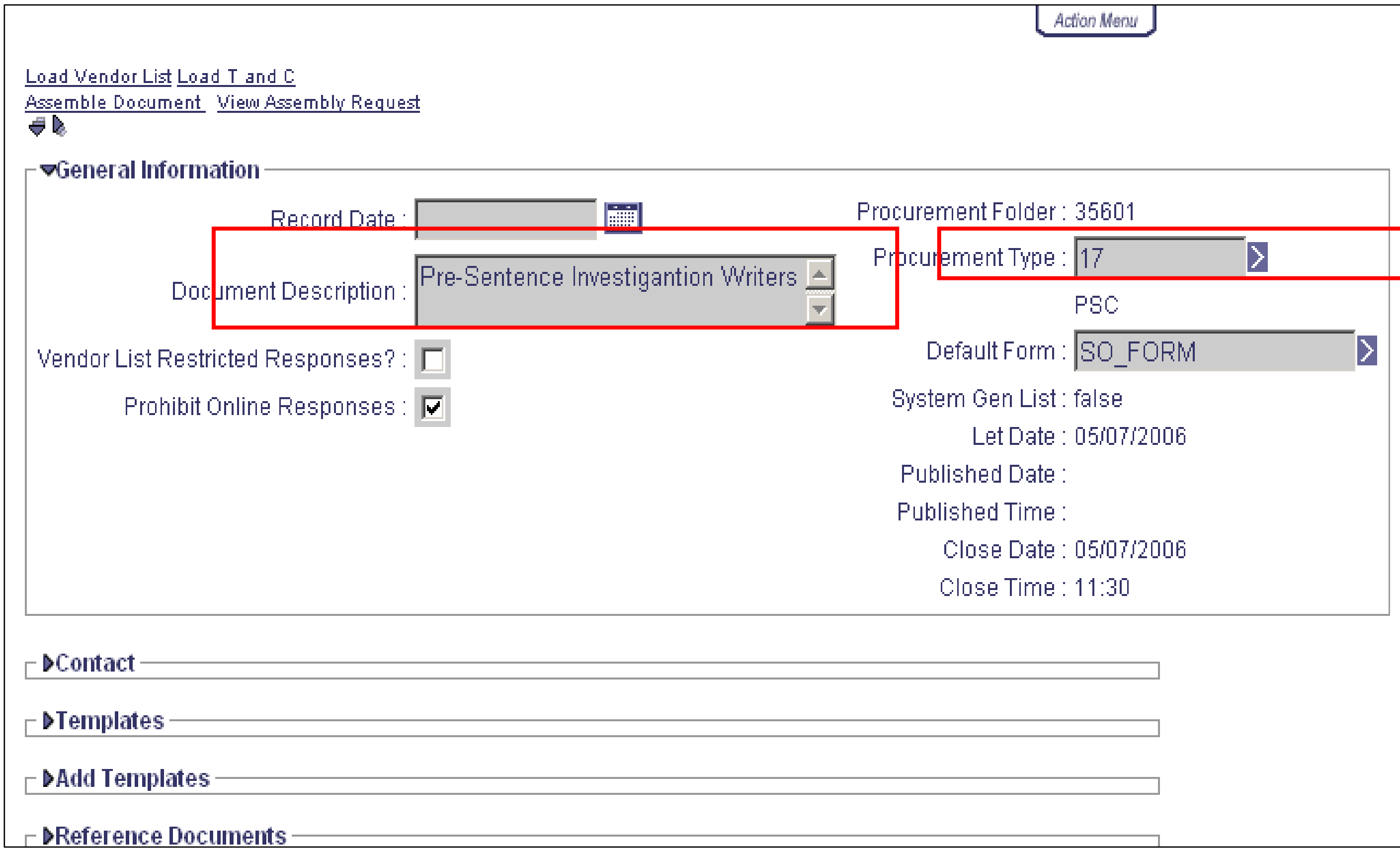


4. Enter the following required fields:

Required Fields	Values
Dept	See Student Card
Unit	UNIT

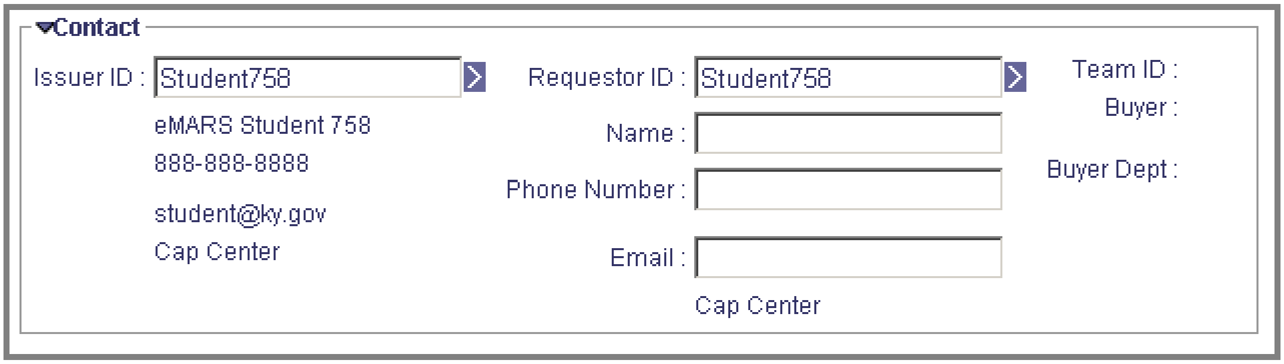
5. Click **Auto Numbering**.

6. Click **Create**. The document opens to the **Header** page.
7. Complete the required fields in the Solicitation document **Header**.



Required Fields	Values
Document Description	Enter "**Pre-Sentence Investigation writers**".
Procurement Type ID	Select "**17**" from the Pick-List for Personal Service Contracts.

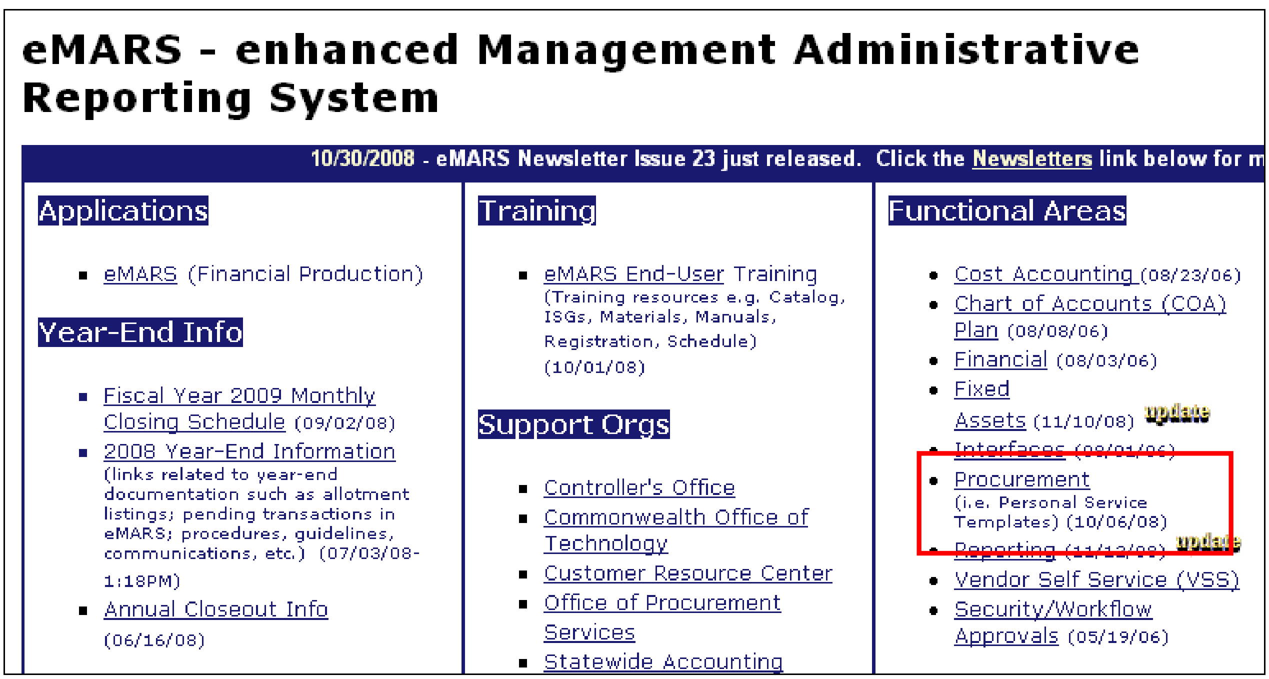
8. Complete the **Contact** section

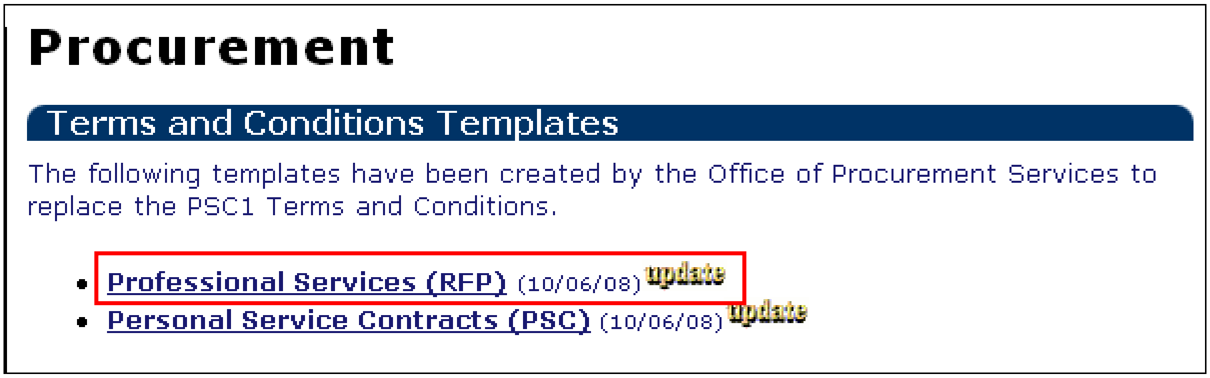


Required Fields	Values
Issuer ID	**Defaults to your ID.**
Requestor ID	**Select your Student-id from the Pick-List as the Requestor.**

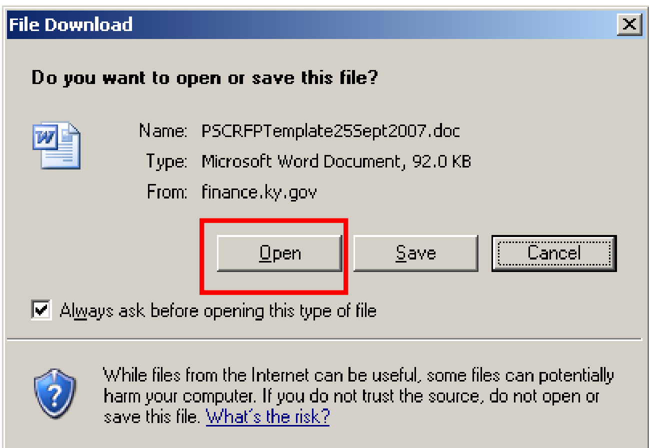
9. Complete the **Terms and Conditions** Component.

10. Navigate to the eMARS website at http://finance.ky.gov/internal/eMARS/ and click on the **Procurement Functional Area.**



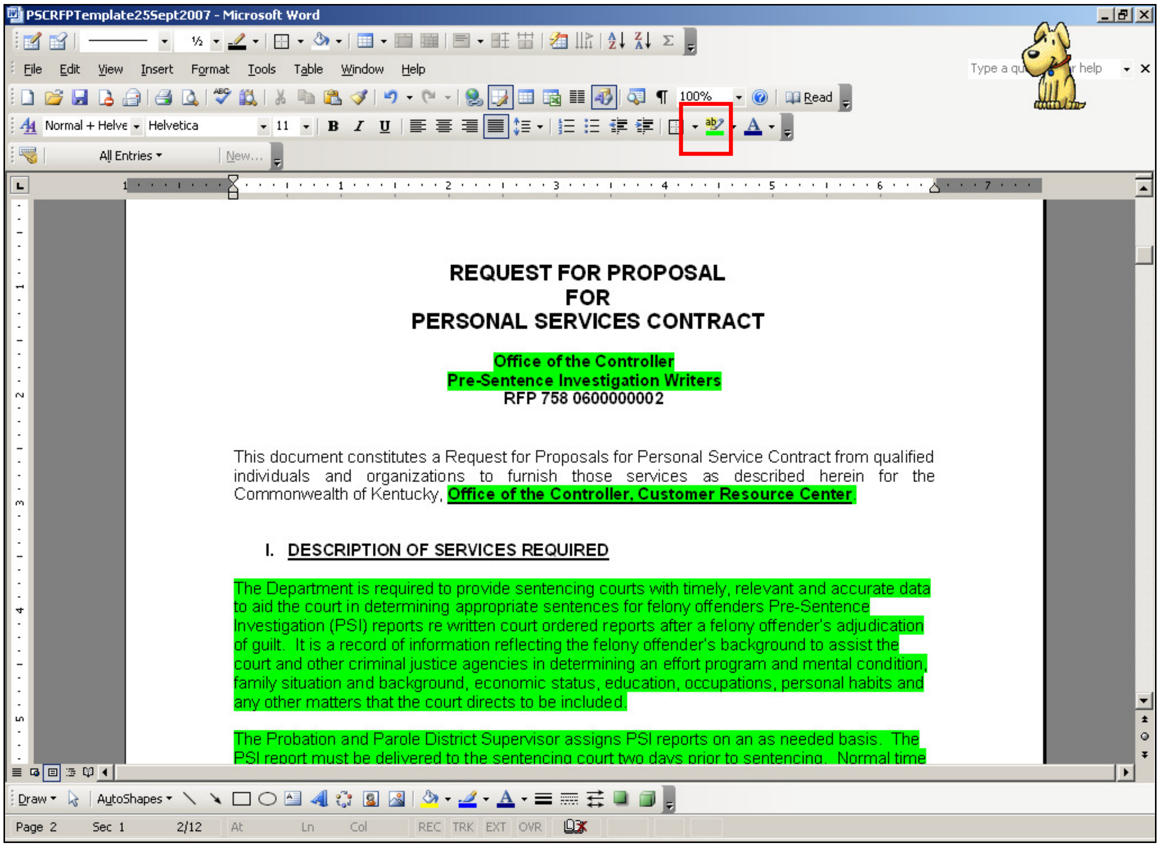


11. Select the **Professional Services (RFP)** template and **Open** a copy of the template that we will modify.



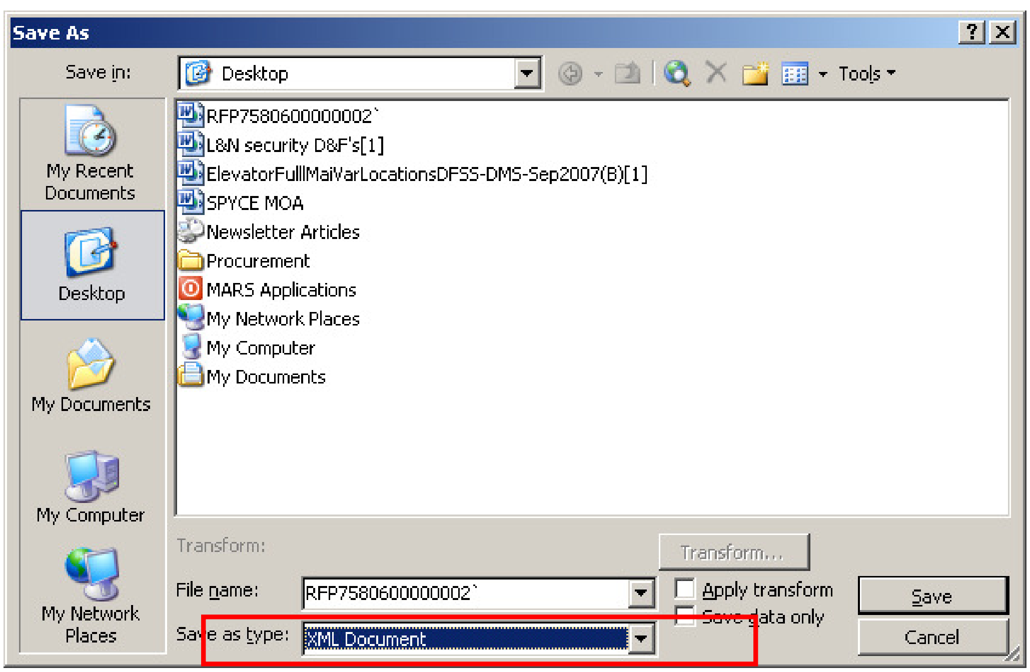
12. Modify only the highlighted sections of the document to make it specific to the agency and the RFP

Required Fields	Values
Name of Agency	Enter: **"Office of the Controller"**
Title of RFP	Enter: **"Pre-Sentence Investigation Writers"**
RFP Number	Enter **Your RFP Document ID**
Description of Services To Be Performed	Enter: **"The Department is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders."**



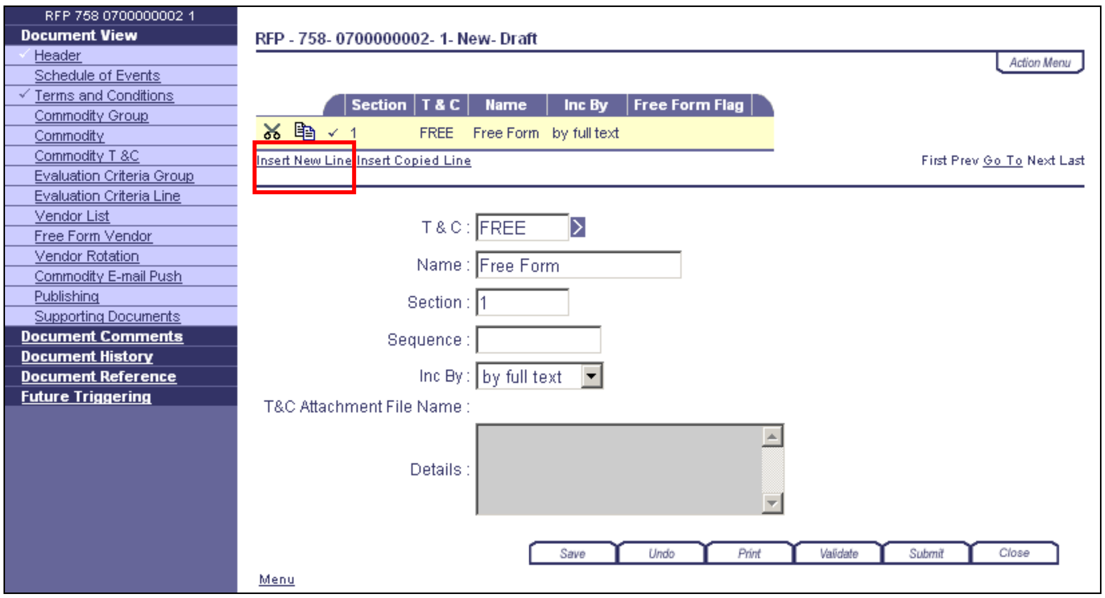
13. After changing the information in the Template to correspond with your RFP remove all Highlighting from the document by selecting all text (Ctrl + A) and remove the highlight.

14. Save the document to your local desktop as **.XML** and close your document.

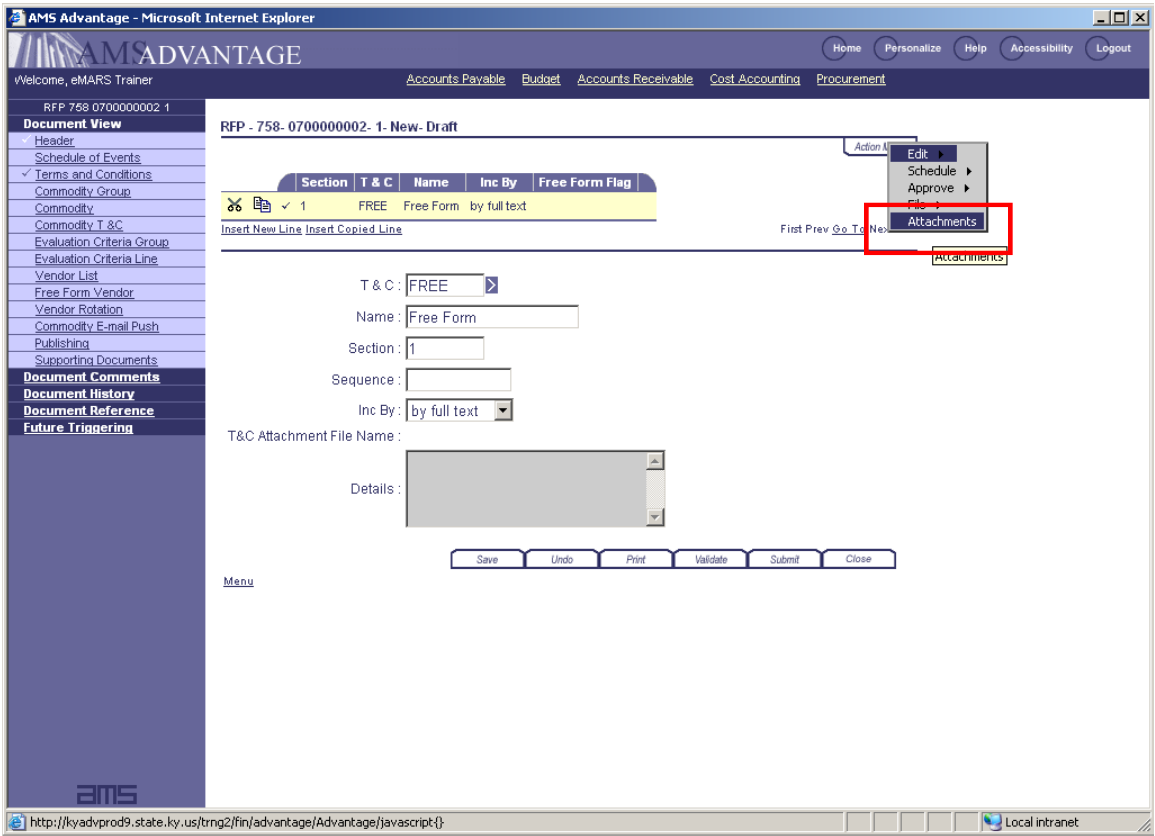


15. Navigate to the **Terms and Conditions** section your RFP and click **Insert New Line**. When the record has been added click on the **arrow** next to the T & C field and select the **Free Form** from the pick list.

NOTE: By selecting the Free Form Terms and Conditions the system allows you to attach your own **.XML** document to your **RFP** rather than a system standard. When the Free Form template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions.



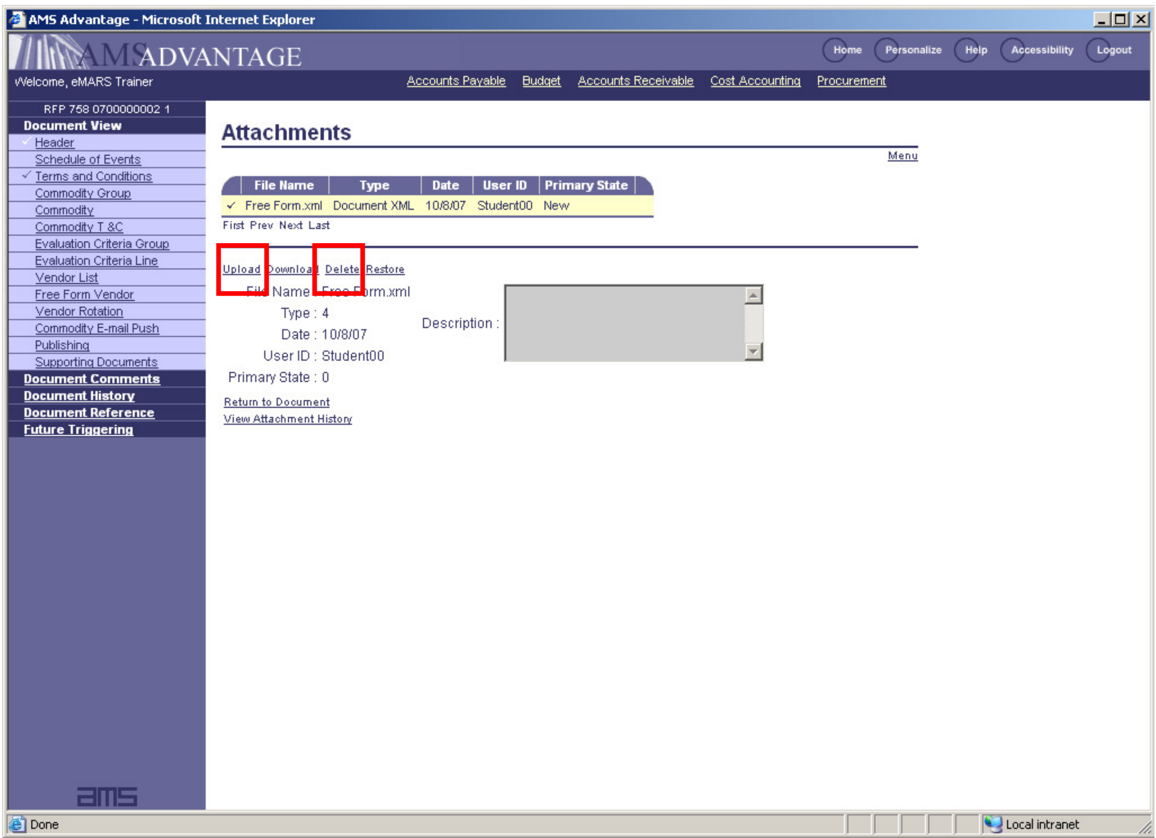
16. Click the **Attachments** link from the **Action Menu**. This will allow you to attach your copy of the desired **RFP** template that you created.



17. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when Free Form was selected from the T & C picklist.

NOTE: When the Free Form template is used a blank document will be incorporated into the Attachments section of the RFP Terms and Conditions. This blank attachment will need to be deleted in order to Upload your correct attachment.

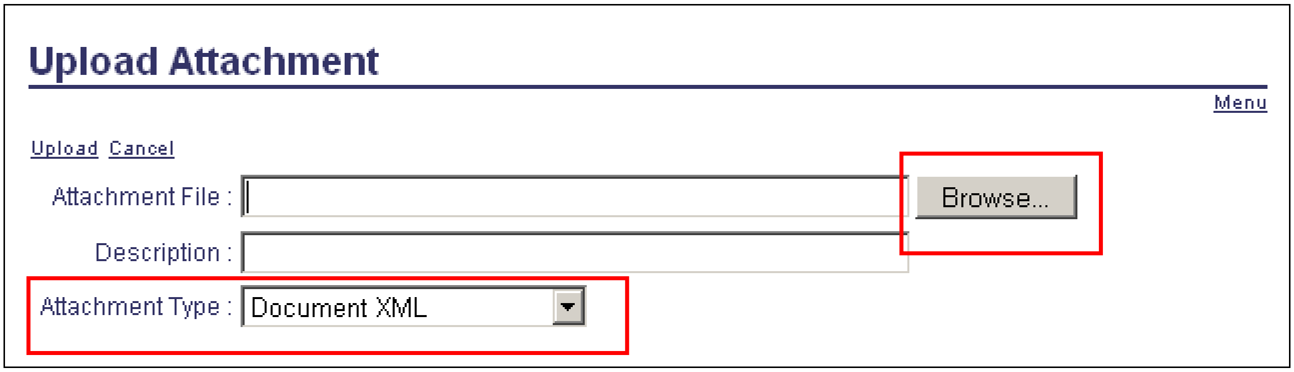
NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.

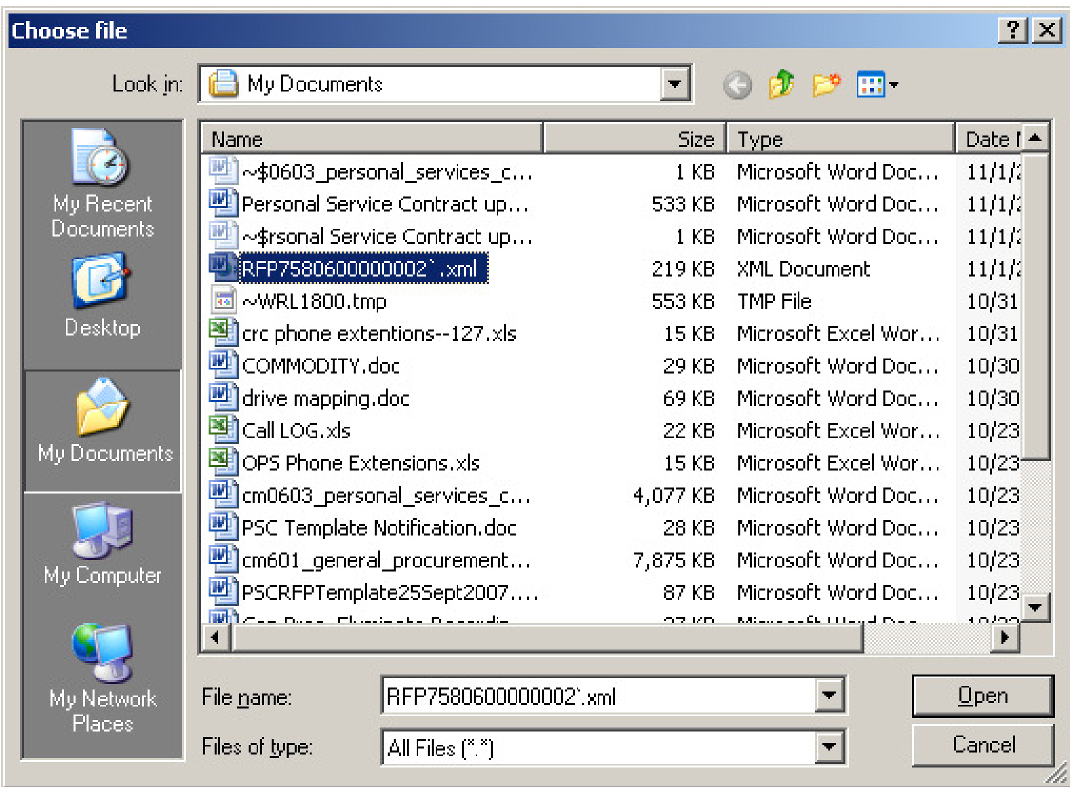


18. Click **Upload** to attach your RFP Template you created in step 12.

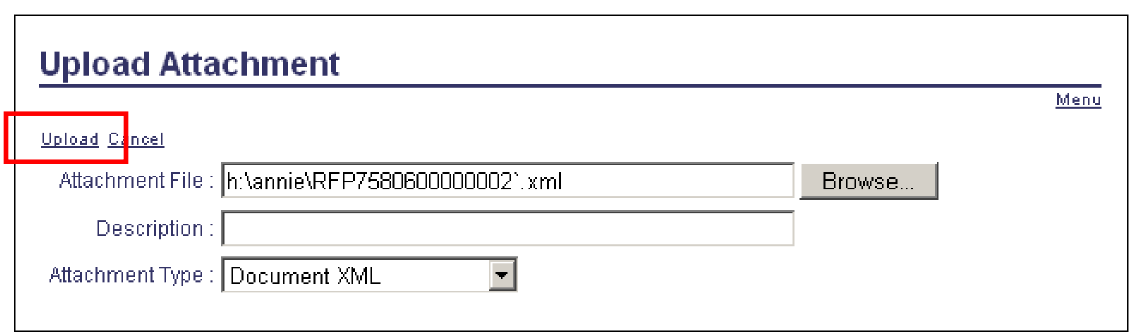
19. **Browse** your local hard files for the RFP Template that has been saved as an XML document. When your document has been found click **Open** to incorporate it into your Solicitation.

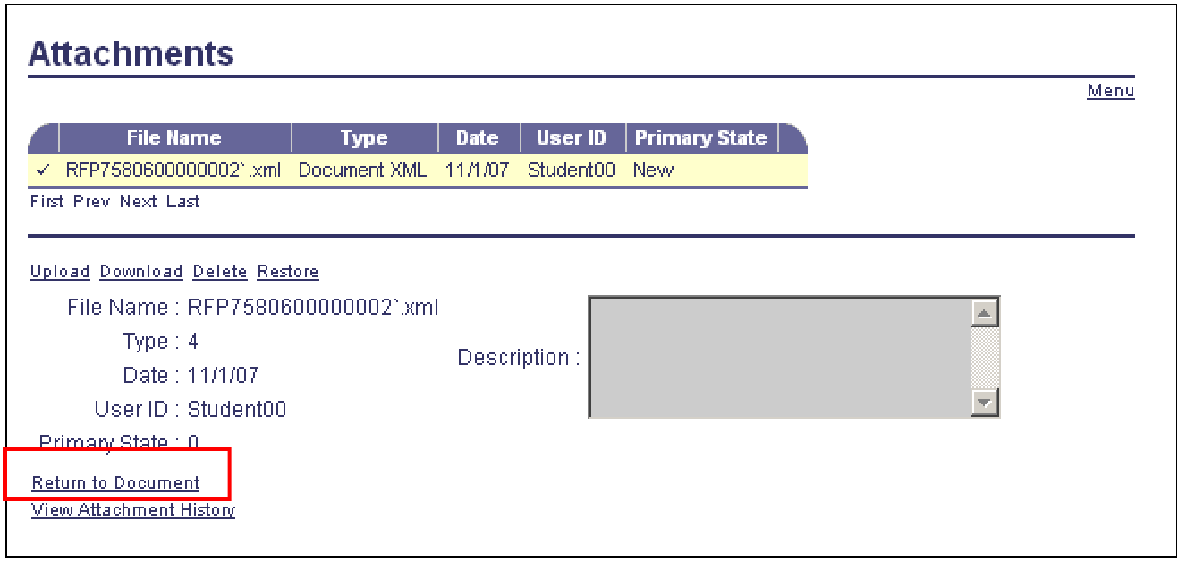
NOTE: Make sure that the Attachment Type of **Document XML** is selected. The Attachment Type of Document XML will be required for all attachments that are included in the Terms and Conditions and Supporting Documents Sections.



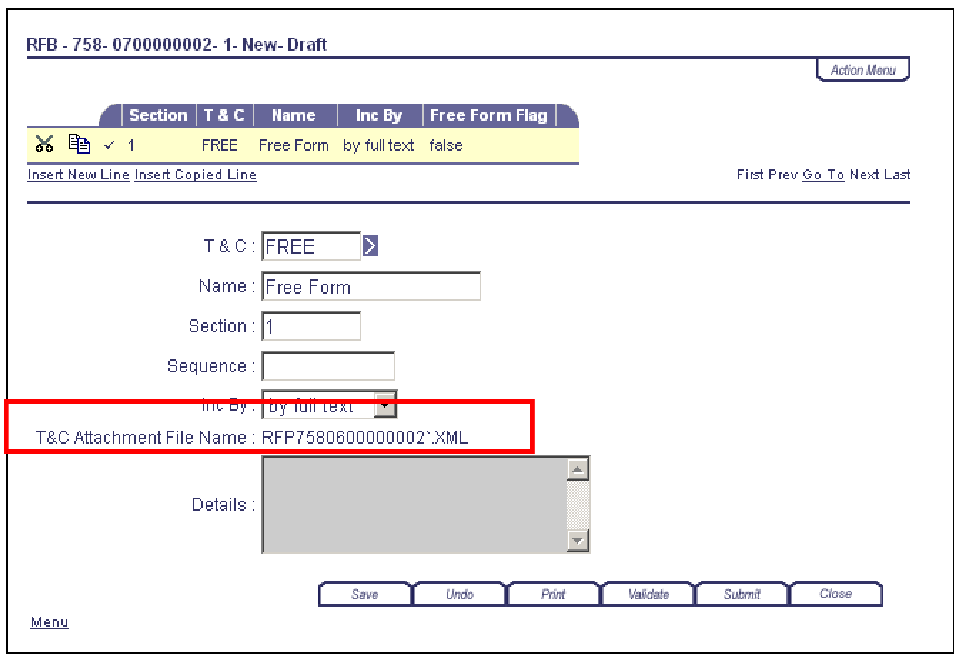


20. Once you have located and selected the file click **Upload.**



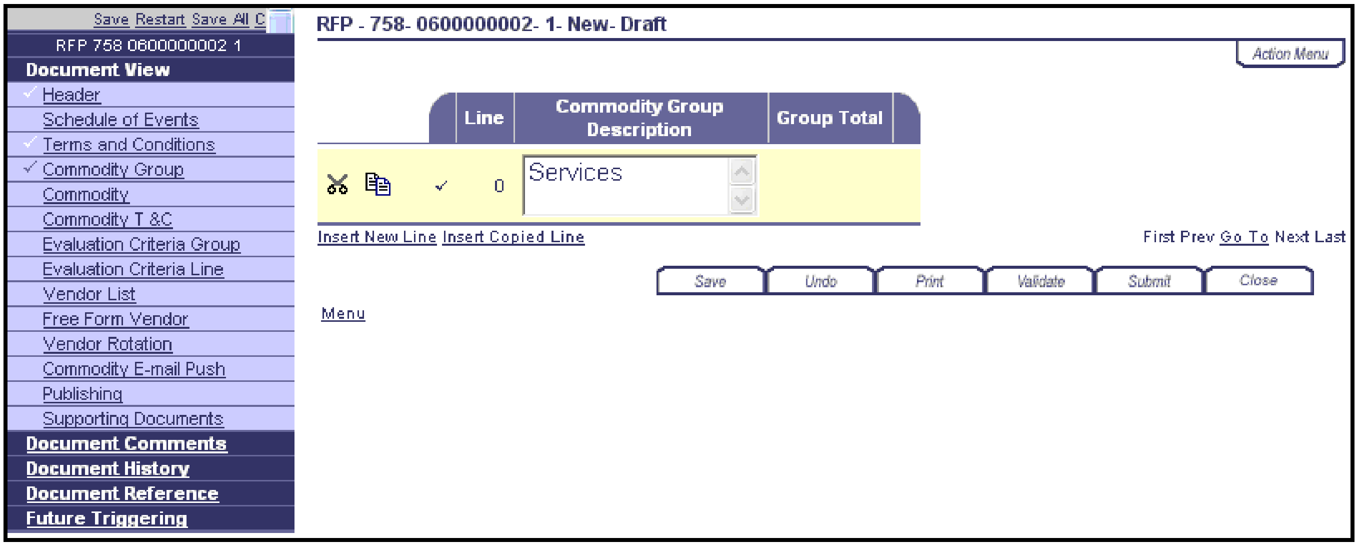


21. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the Terms and Conditions section of the RFP. Once there you will notice that the T & C Attachment File Name has changed to your new file. eMARS will use this new file in the bid package/print out.



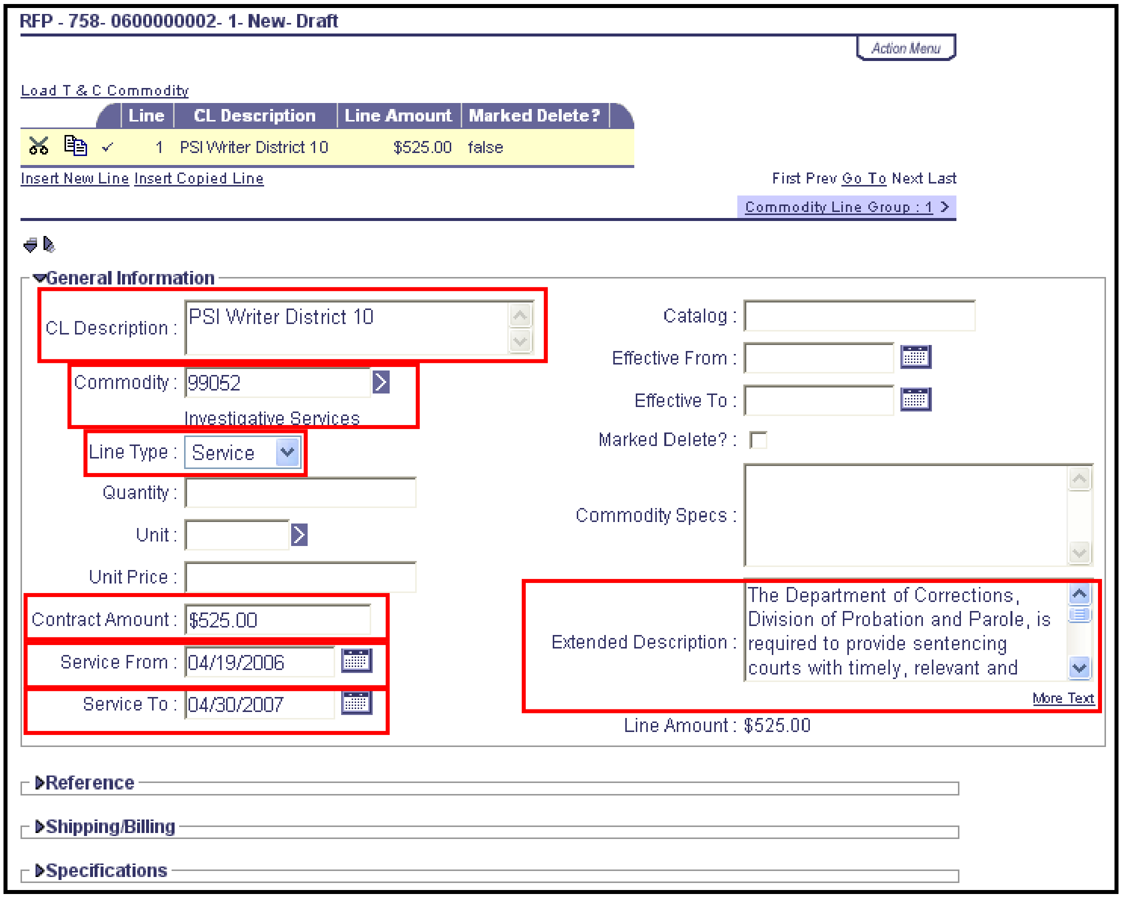
22. Create **Commodity Groups**. Click on **Commodity Groups** in the Secondary Navigation Panel.

NOTE: A default group is always created.



23. For a single **Commodity Group**, change the **Commodity Group** Description from “Default” to “Services”.
24. Click on the **Commodity** link in the Secondary Navigation Panel to create the Commodities associated with the **Commodity Group**. The **Commodity** section opens.

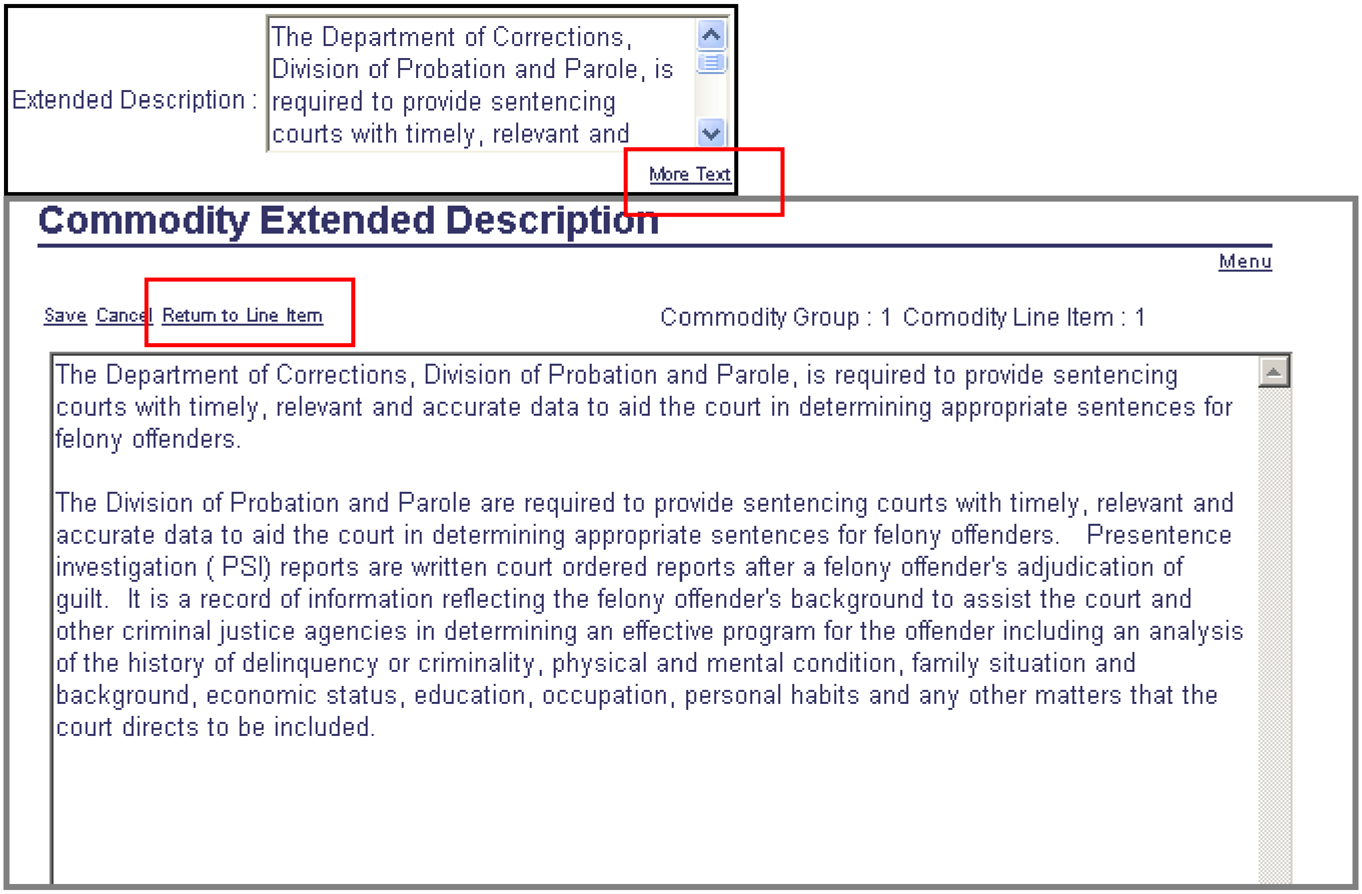
25. Click **Insert New Line**, and complete the required fields for the **General Information** Section.



Required Fields	Values
CL Description	Enter "**PSI Writer District 10**".
Commodity	Select **99052** from the pick list.
Line Type	Pick "**Service**" from the list
Contract Amount	Enter **$1200.00**
Service From	Enter **One Month from Today**
Service To	Enter **Two Months from Today**
Extended Description	Enter: "**The Department of Corrections, Division of Probation and Parole, is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders.** " NOTE: To insert a TAB into the **Extended Description** field, type [Ctrl]+[Tab].

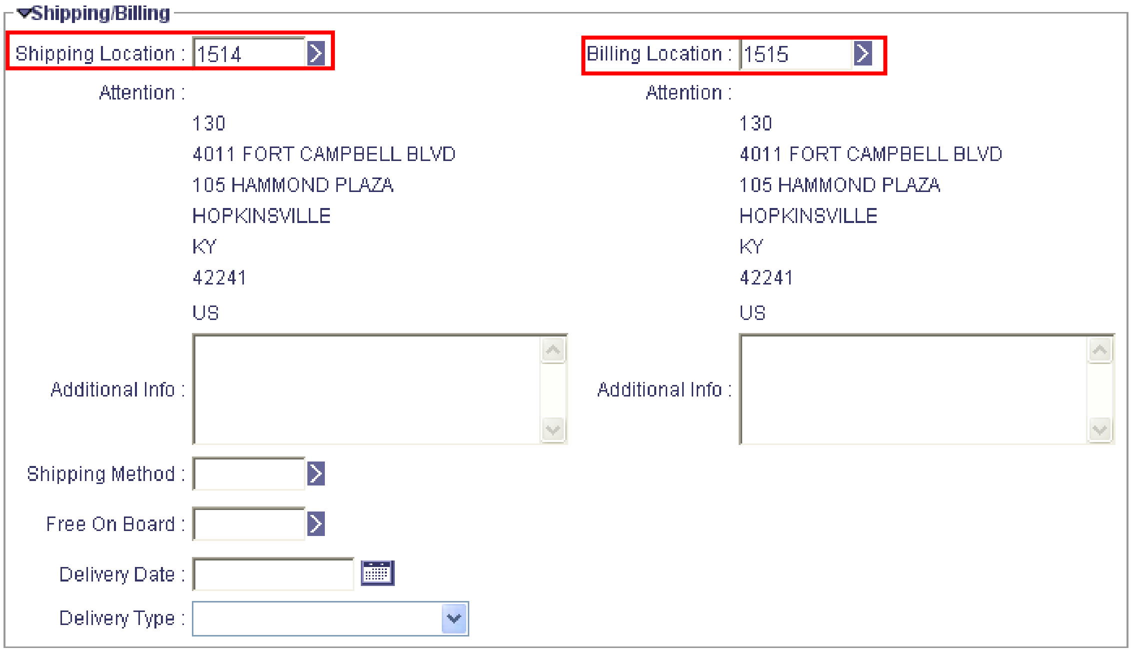
26. Click the **More Text** link to display a larger Extended Description window. Enter the following additional text:

    "The Division of Probation and Parole are required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre-sentence investigation (PSI) reports are written, court ordered reports after a felony offender's adjudication of guilt."



27. Click the **Return to Line Item** link.

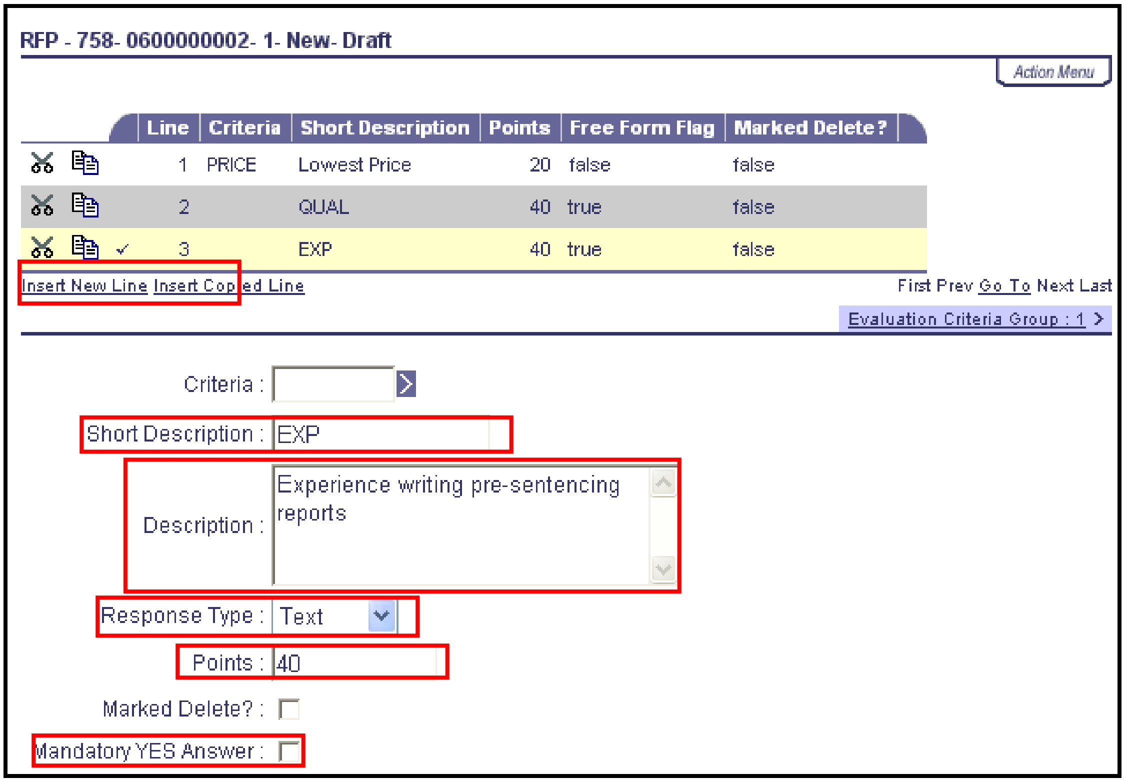
28. Complete the **Shipping/Billing** Information.



Enter the following required fields:

Required Fields	Values
Shipping Location	Select the **1514** from the pick list.
Billing Location	Select **1515** from the pick list.

29. **Create Evaluation Criteria**. Click **Evaluation Criteria Line** in the Secondary Navigation Panel. This section allows you to define specific considerations for evaluating responses and applies a point value for each. You will create four **Evaluation Criteria** in this example: Price, Qualifications, Experience and Scope of Work.



30. Click **Insert New Line** to enter the first Evaluation Criteria.

Required Fields	Values
Criteria	Select **"Price"** from the pick list for the first criteria.
Short Description	Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. **Leave as Defaulted**
Description	**Leave as Defaulted**
Response Type	Defaults to "**Text**"
Points	Used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter "**20**"
Marked Delete?	Leave blank for all criteria
Mandatory YES Answer	Leave blank for all criteria

31. Click **Insert New Line** to enter in the second **Evaluation Criteria**.

Required Fields	Values
Criteria	**Leave Blank**
Short Description	Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter "**QUAL**"
Description	Enter **"Qualifications and Training"**
Response Type	Select "**Text**"
Points	Used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter "**40**"
Marked Delete?	Leave blank for all criteria
Mandatory YES Answer	Leave blank for all criteria

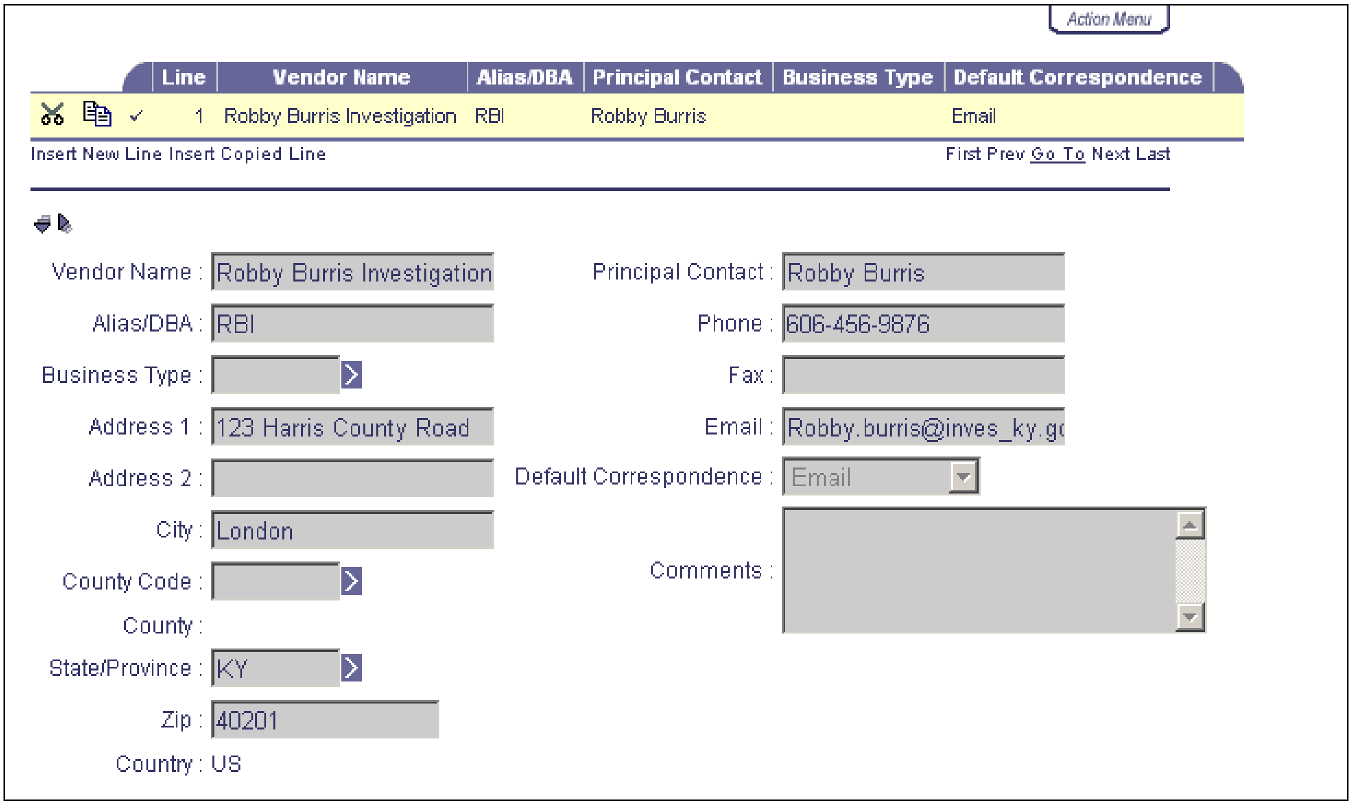
32. Click **Insert New Line** to enter in the third **Evaluation Criteria**.

Required Fields	Values
Criteria	**Leave Blank**
Short Description	Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter "**EXP**"
Description	Enter **"Experience Writing Pre-Sentencing Reports"**
Response Type	Select "**Text**"
Points	Used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter "**40**"
Marked Delete?	Leave blank for all criteria
Mandatory YES Answer	Leave blank for all criteria

33. Click **Insert New Line** to entire in the fourth **Evaluation Criteria**.

Required Fields	Values
Criteria	**Leave Blank**
Short Description	Used to describe the briefly describe the Evaluation criteria. This fields will be populated if a pre-defined Evaluation criteria has been selected from the pick list. Enter "**SOW**"
Description	Enter **"Scope of Work"**
Response Type	Select "**Text**"
Points	Used to determine how many points may be awarded to a Vendor for the Response they've provided. It is used as part of the Evaluation process to determine which vendor will receive the award. Enter "**50**"
Marked Delete?	Leave blank for all criteria
Mandatory YES Answer	Leave blank for all criteria

34. Create the **Free-Form Vendor** list. Select **Free-Form Vendor** from the Secondary Navigation Panel.

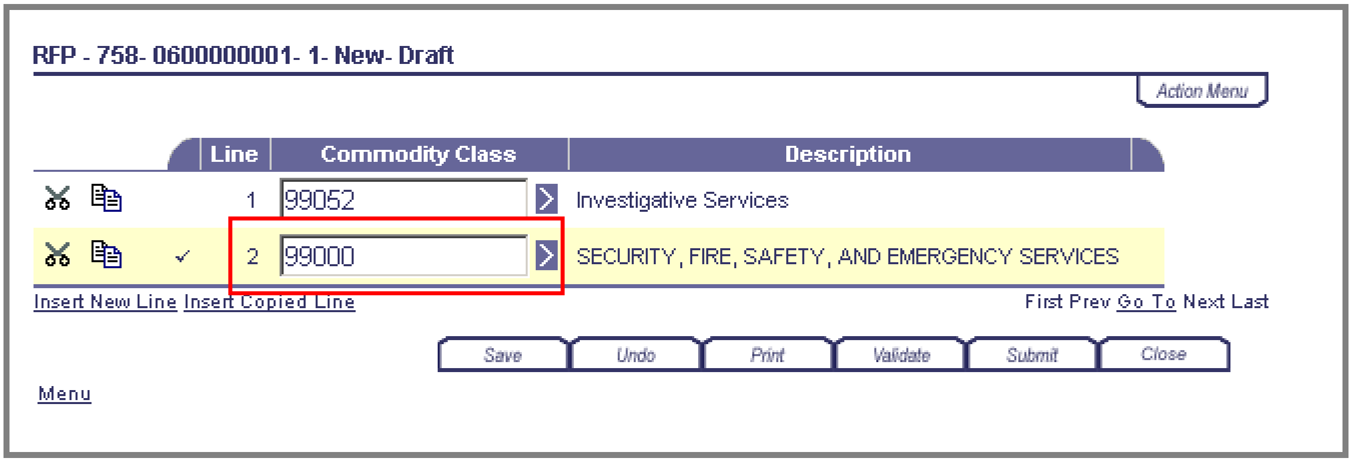


35. Click **Insert New Line** and enter the following required fields:

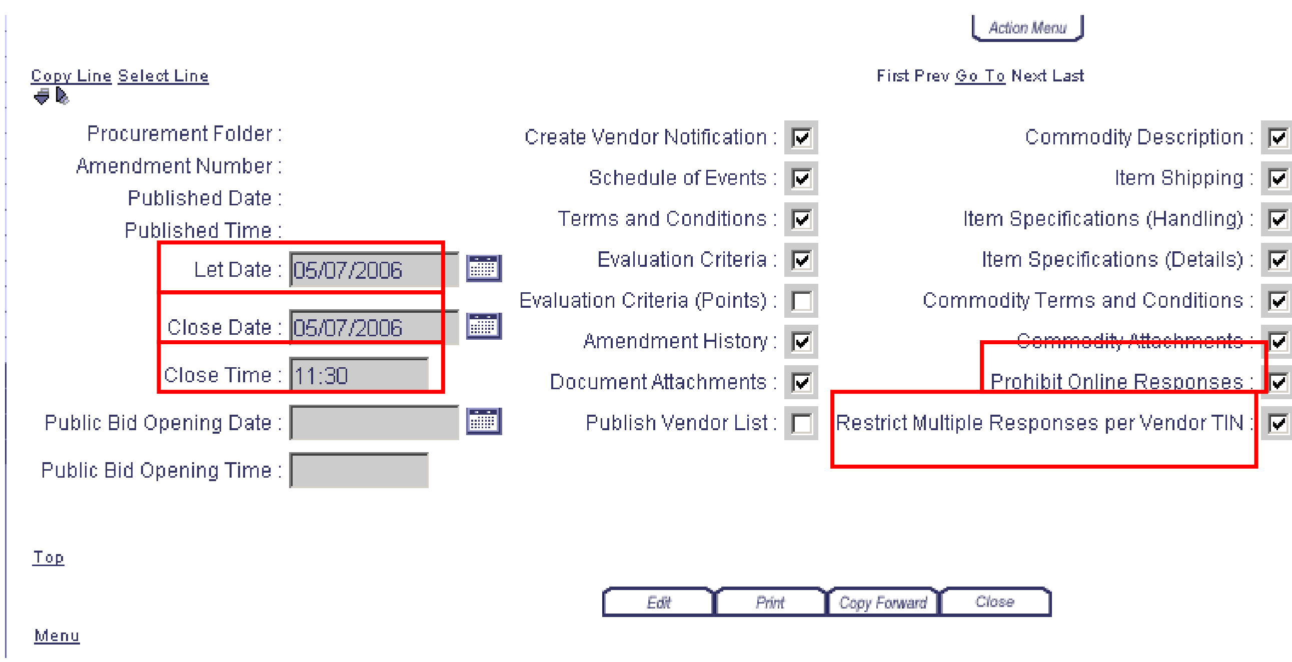
Required Fields	Values
Vendor Name	Robby Burris Investigation
Alias/DBA	RBI
Address 1/Address 2	123 Harris County Road
City	London
State/Province	KY
Zip	40201
Principal Contact	Robby Burris
Phone	606-456-9876
FAX	Leave Blank
E-MAIL	Robby.burris@inves_ky.com
Default Correspondence	E-Mail

36. Click **Validate**, but expect errors. You are validating so the **Commodity E-mail Push** page will be populated as expected.

37. Inspect the **Commodity E-mail Push**. Select **Commodity E-mail Push** from the Secondary Navigation Panel. Vendors will receive automatic notification if they have registered for the Commodities listed on this component. This section is automatically populated based on the Commodity Codes in the **Commodity** section. You may also add and delete Commodity Codes as required.



38. Complete the **Publishing** Section. Click **Publishing** from the Secondary Navigation Panel.

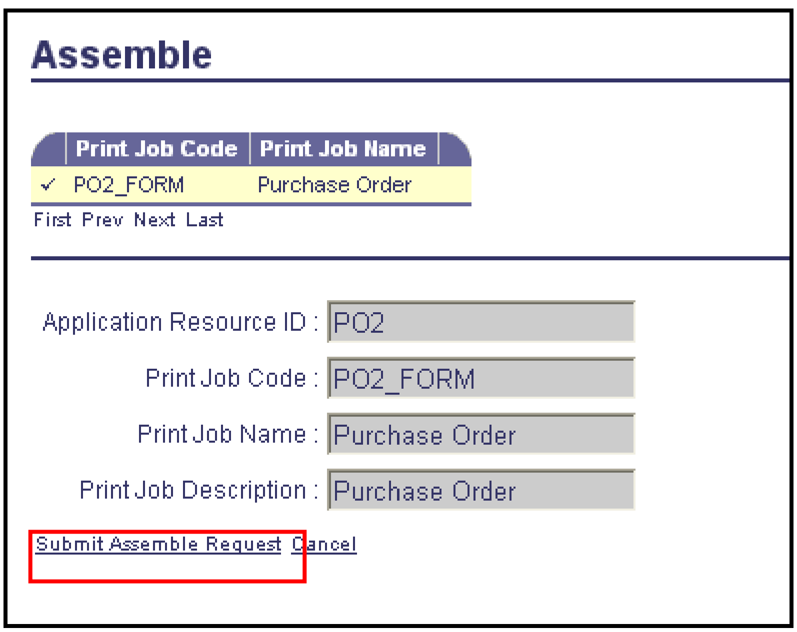


39. Enter the following required fields:

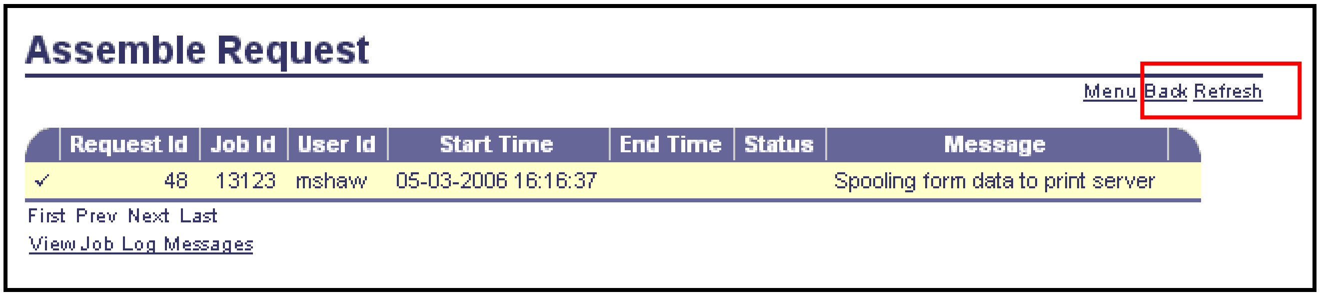
Required Fields	Values
Let Date	Enter **Today's Date**
Close Date	Enter **Today's Date**
Close Time	Enter time for ½ hour from now. E.g. if it is 10 in the morning enter: 10:30 **Note: Closing Time must be supplied in 24hr military time.**
Public Bid Opening Date (Optional)	**Leave blank.**
Public Bid Opening Time (Optional)	**Leave blank**.
Prohibit Online Responses	**Click to select**
Restrict Multiple Responses per Vendor TIN	**Select the flag.**

40. Once all information on the Solicitation has been verified, click **Validate** to check the document for errors.

41. Click **Header.** Click **Assemble Document.** The **Assemble** page will open.



42. Click **Submit Assemble Request.** A batch job will be initiated to Assemble a Draft **PDF** version of the Solicitation.
43. Click **Refresh** until you see that you have a Successful Status.



44. Click **Back** to return to the document **Header**. When the job completes go to the **Action Menu**>>**Attachments** and **Download** the **PDF**.
45. Once finished reviewing the **PDF** file close the window. Once in the Attachments page click **Return To Document** to return to the Header.

46. **Submit** the document to initiate workflow for approval.

47. Write down your document number on your Student Card. You will need this in later exercises.

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5 –Record Vendor Responses Using the Solicitation Wizard (SRW).

Vendor responses are not recorded directly onto the Evaluation document but are instead individually recorded using the Solicitation Response (**SR)** document or the Solicitation Response Wizard **SRW** document. These responses are then loaded and consolidated in the Evaluation (**EV**) document.

Vendor Response using the Solicitation Response Wizard

Access your **Procurement Workspace** and click the **Enter Bid Response** link in the Secondary Navigation Panel. Expand the **Solicitation Response** section. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** page opens.

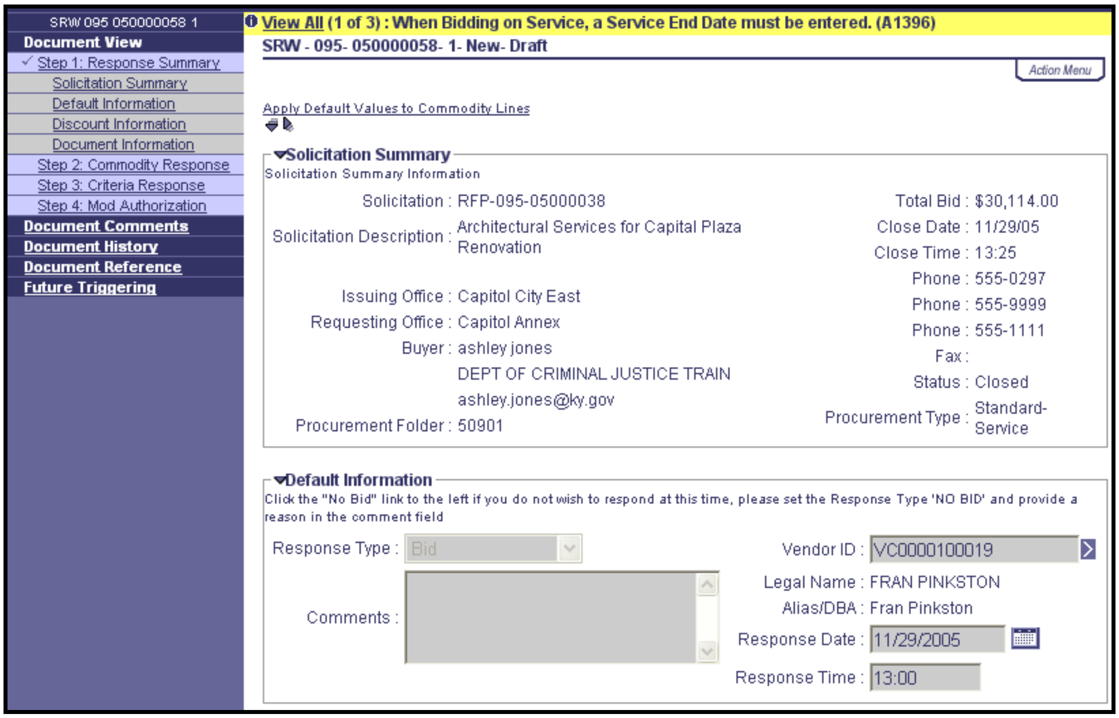
Enter the Solicitation and Vendor Information on the **SRWZRD** page. The **Solicitation Response Wizard** (**SRWZRD**) page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.

- The **Solicitation Document Code** is the document code from the Solicitation for which you want to record a Response.
- The **Solicitation Department** is the Document Department for the Solicitation for which you want to record a response.
- You may manually type in the **Solicitation Document ID** if you know it or you may search for it by clicking on the **arrow** to expand the pick list. The **Solicitation Document ID** page will open. This page is a filtered list of all those Solicitation documents where the Let Date is less then today's date and the Solicitation has not been awarded. This page will be further

filtered by the values that you have entered in **Solicitation Document Code** field and the **Solicitation Department** field.

- Select the Vendor that is responding to the Solicitation by choosing a **Vendor ID** under the **Solicitation Information** section.

Complete the **Response Summary** – This section displays the solicitation and Vendor information, which was entered on the **SRWZRD** page.

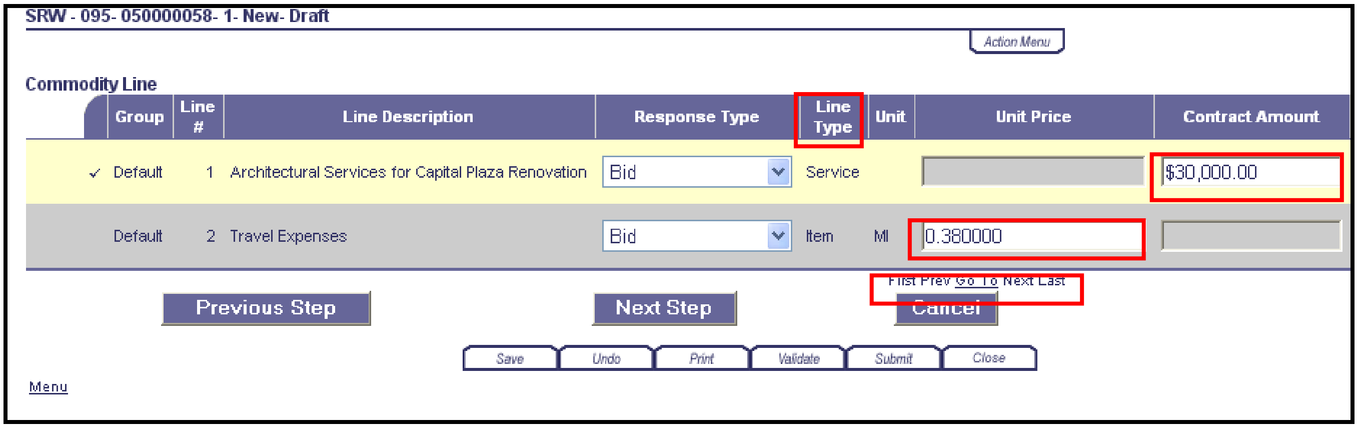


- There are two required fields in this section: **Response Date** and **Response Time**. The data entered into these fields must be after the **Let Date** and less than the **Closing Date** and **Closing Time** for the referenced solicitation.

NOTE: The Response Time must be supplied in 24hr military time (e.g. 9:30am=09:30, 2:00pm=14:00).

- The **Legal Name** and **Alias/DBA** for the Vendor are inferred from the **VCUST** table. Users may optionally enter prompt payment discounts and optionally record default **Response Types** as well as default **Comments**. If **Response Types** and **Comments** have been entered, and the **Apply Default Values to Commodity Lines** link is clicked, the system will populate the corresponding values on the Step 2: **Commodity Response** section upon saving.

Complete the **Commodity Response** grid – This section displays all Commodity line items for all Commodity Groups from the referenced solicitation. Up to 15 Commodity line items can be displayed in the grid. If there are more than 15 Commodity line items, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Line Number.

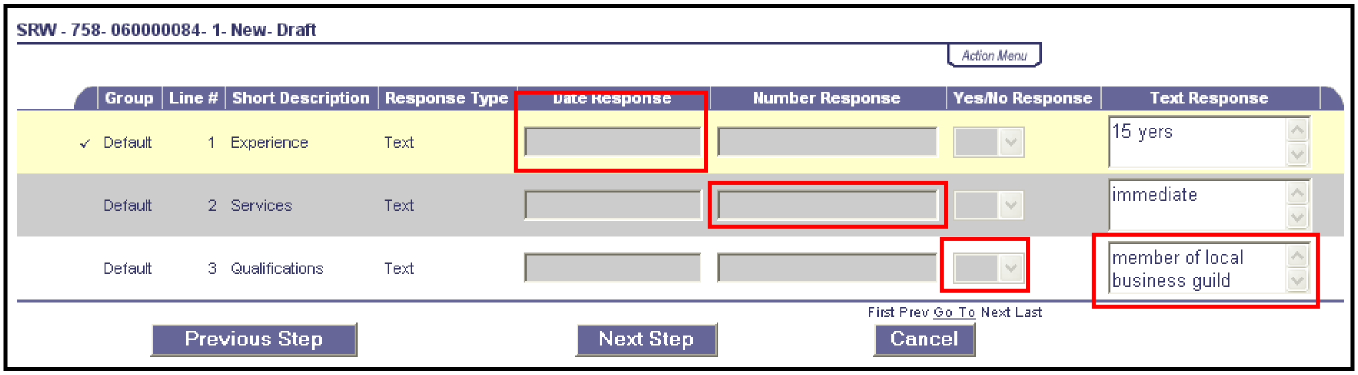


The **Line Type** determines the required fields for each Commodity line, as outlined in the table below.

If the Line Type is:	Then the Required Fields are:
Item	Response Type, Unit, Unit Price, Delivery Days
Service	Response Type, Bid Contract Amount
Discount	Response Type, Discount %, Effective To, Effective From, Bid Catalog
Catalog	Response Type, Discount %, Effective To, Effective From, Bid Catalog

- The **Response Type** for each Commodity line defaults to “Bid”, but can be changed. You can optionally enter data into the **Comments** field. If the **Response Type** for any of the above line types is “No-bid” then you should only enter text in the **Comments** field; however, the system will not prevent you from entering data in the other fields.
- You may use the **TAB** key to navigate through the grid. Selecting the **TAB** key will advance the user to the next required field based on line type. If the cursor is in the last required field for a row then typing the **TAB** key will transition to the cursor to the first row on the next line.

Complete the **Criteria Response** grid. This section displays all **Evaluation Criteria** lines for the different Criteria Groups from the referenced Solicitation. Up to 15 criteria lines can be displayed in the grid. If there are more than 15 lines, then you can navigate between the records by clicking the **Next**, **Previous**, **First**, and **Last** links. The rows in the grid are sorted by Group and then by Criteria Number. Only the required fields for each Line Item Type are editable.



The **Response Type** for each criteria on the Solicitation determines which response field is required on the **SRW**.

If the Response Type is:	Then the Required Fields is:
Date	Date Response (mm/dd/yyyy)
Number	Number Response (any numeric value)
Yes/No	Yes/No Response
Text	Text Response (Can be any combination of text and numbers up to 256 characters)

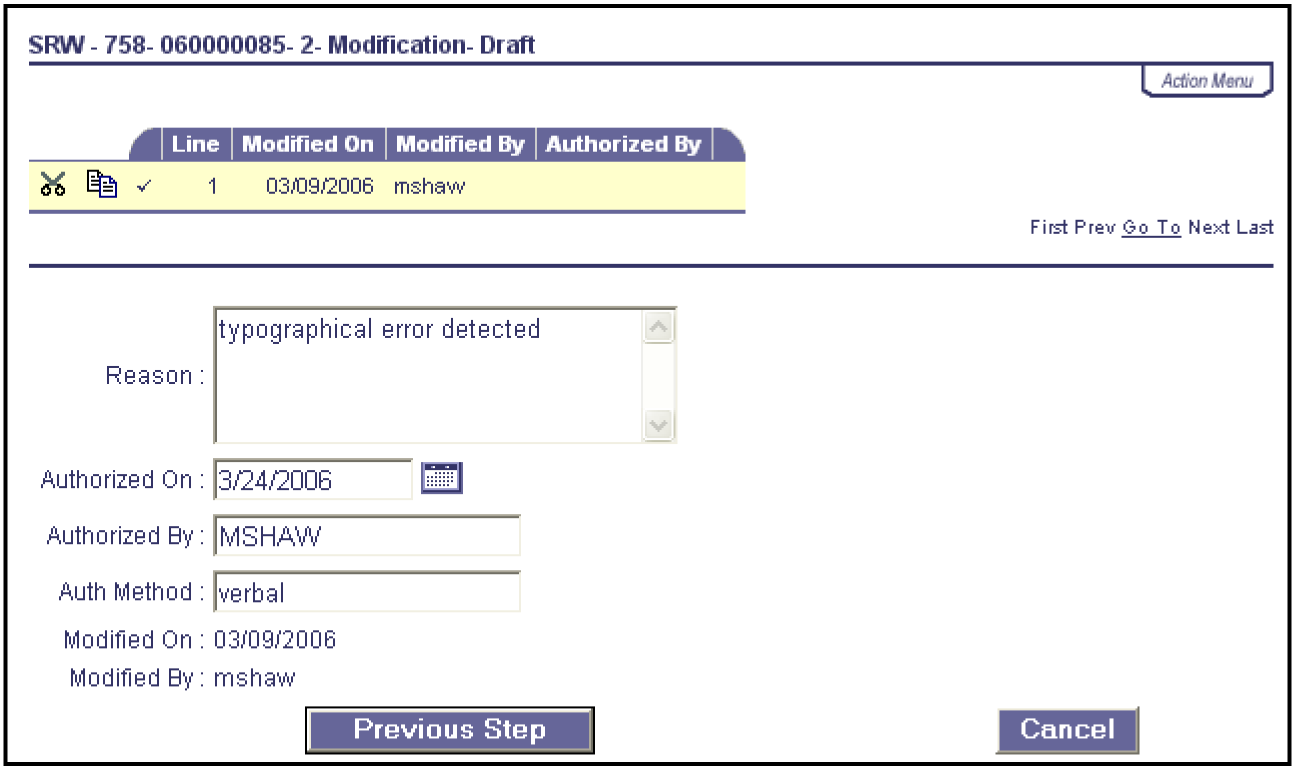
Click **Validate** and then **Submit** to finalize the **SRW** document. When you close the document you will transition back to the **SRWZRD** page where you can enter a response for a new Vendor without retyping the Solicitation ID.

How to print the SRW document:

1. Select **Print** located at bottom of page.
2. Print page opens, Click **Print** and print job returns "Submitted Successfully".
3. On the Action Menu, select "**Attachments**"
4. Highlight a row that has the Document ID on it (do not highlight the row with **XML** in it)
5. Select **Download**. You should get a pop-up window (assuming you have Adobe on your PC) asking you to either open or save the file.
6. Select **Open.** This will open a session of Adobe and open the file.
7. Print the document from Adobe.

NOTE: Approvals are not required for **Solicitation Response Wizard** (**SRW**) documents. They will Submit to Final.

If you need to modify a finalized **SRW** you must complete the Mod Authorization step.



- In order to submit a modification to a **SRW** document, you must describe the reason for the modification in the **Reason** field
- List who authorized the modification in the **Authorized By** field
- Record the date the modification was authorized in the **Authorized On** field.

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Exercise 2 – Record a Vendor Response to the RFP using the SR Wizard (SRW).

Scenario

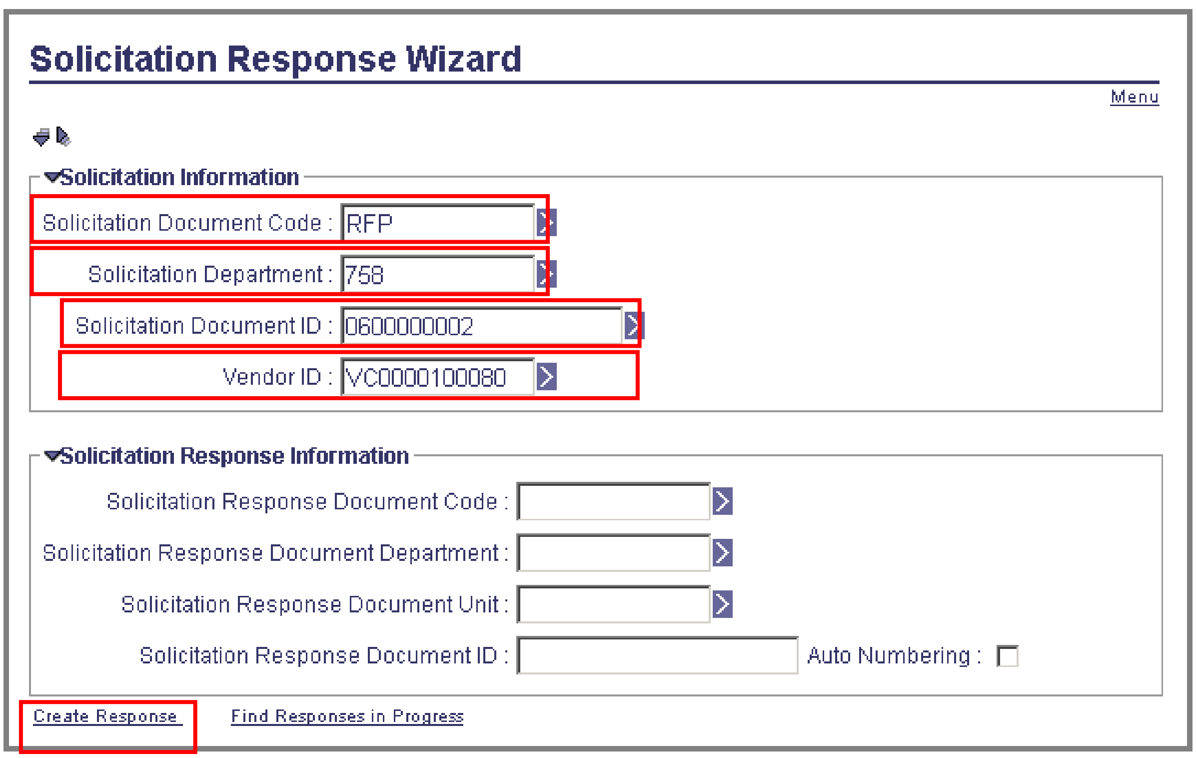
You have received several paper responses to the **RFP** you created in Exercise 1. You must record these responses into the system.

Task Overview

You will access the **Solicitation Response Wizard** page from your **Procurement Workspace** and initiate two Vendor Responses to the **RFP** document you created in Exercise 1. You will record the Vendors price proposals and enter Vendor Responses to the **Evaluation Criteria**.

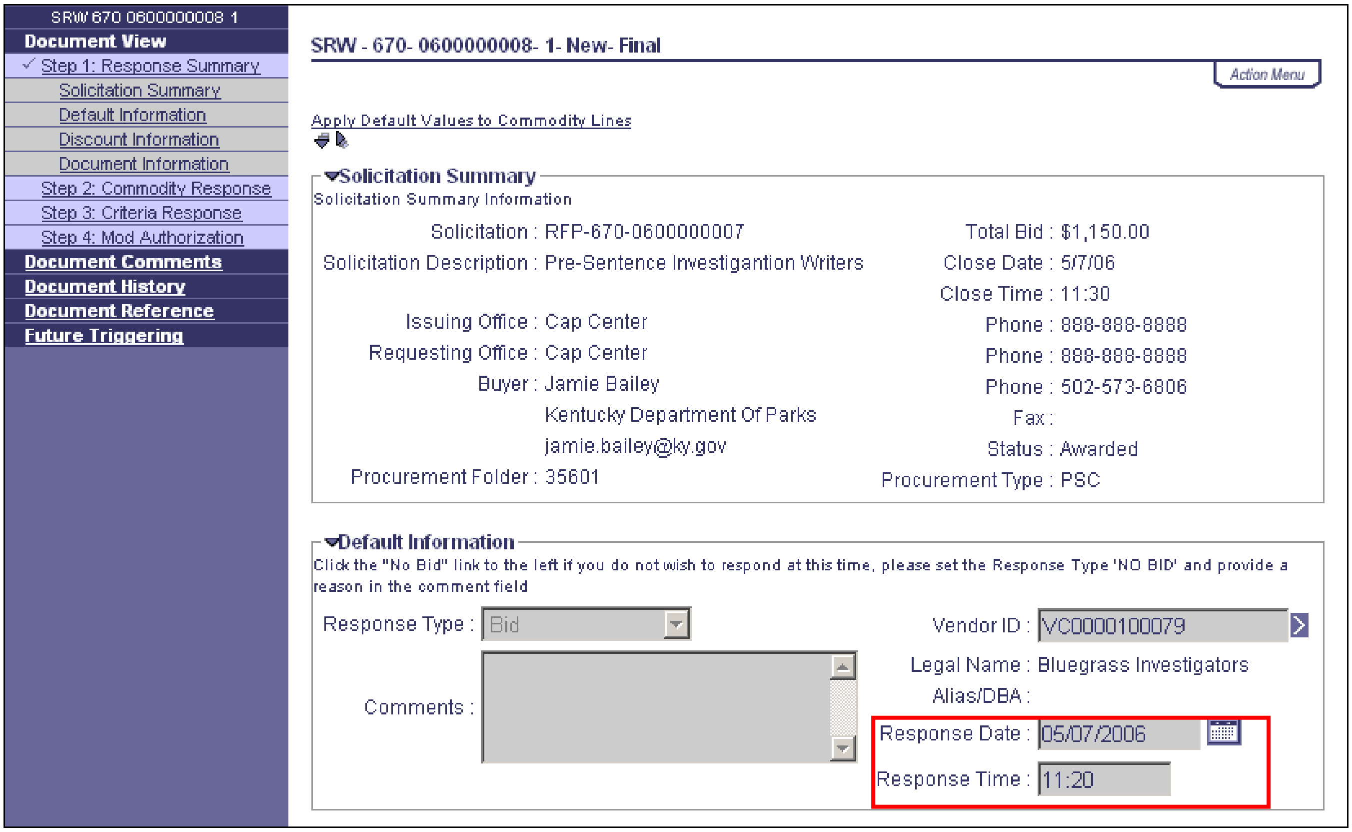
Procedures

1. Access your **Procurement Workspace** and click **Enter Bid Response** in the Secondary Navigation Panel. Expand the **Solicitation Response** section.
2. Click **Solicitation Response Wizard (SRWZRD)**. The **Solicitation Response Wizard** page will open.
3. Enter the Solicitation and Vendor Information on the **SRWZRD** page. The **Solicitation Response Wizard** (**SRWZRD**) page allows you to initiate the **Solicitation Response Wizard** interface, which enables manual or paper Solicitation Responses from a Vendor to be rapidly entered into the system.



Required Fields	Values
Solicitation Document Code	Enter “**RFP**”.
Solicitation Department	**Type in the department from your Student Card**.
Solicitation Document ID	**Open the pick list and select the RFP you created in Exercise 1.**
Vendor ID	Search for and select “**Bluegrass Investigators**” from the pick list.
Solicitation Response Document Code	**Leave blank.**
Solicitation Response Document Department	**Leave blank.**
Solicitation Response Document Unit	**Leave blank.**
Solicitation Response Document ID	**Leave blank.**

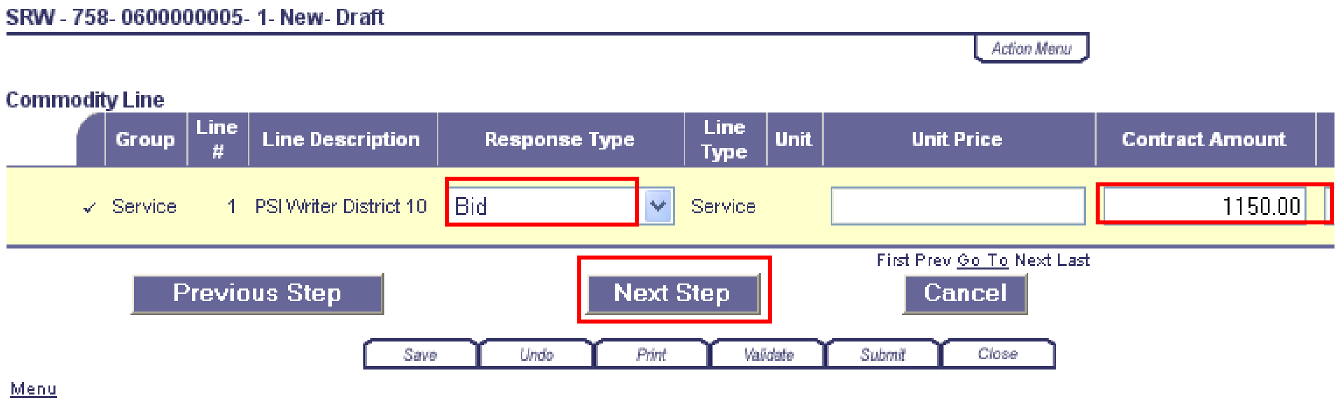
4. Click **Create Response**.
5. Complete the **Response Summary** section. This section displays the Solicitation and Vendor information, which was entered on the **SRWZRD** page.



Required Fields	Values
Response Date	Enter **Today's Date**
Response Time	Enter a time that is before the Close Time listed in the Solicitation you created in Exercise 1.

Other Fields	Values
Legal Name	Inferred from the **VCUST** table.
Alias/DBA	Inferred from the **VCUST** table.
Response Type	If **Response Type** and **Comments** have been entered, and the **Apply Default Values to Commodity Lines** link is clicked, the system will populate the corresponding values on the Step 2: **Commodity Response** section upon saving.
Comments	

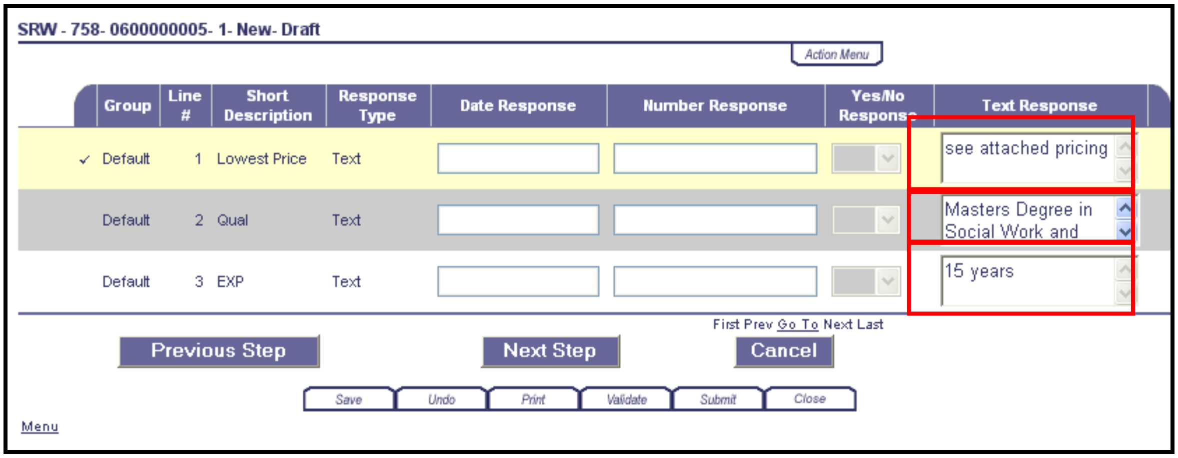
6. Click **Next Step** and complete **Commodity Response** grid. Enter the required fields below.



Required Fields	Values
Response Type	Leave as defaulted.
Contract Amount	Enter: **$1150.00**
Comments (Optional)	Leave blank. NOTE: If the **Response Type** for any of the above line types is *no-bid* then you should only enter text in the **Comments** field; however, the system will not prevent you from entering data in the other fields.

NOTE: You may use the **TAB** key to navigate through the grid. Selecting the **TAB** key will advance your cursor to the next required field based on line type. If the cursor is in the last required field for a row then typing the **TAB** key will transition to the cursor to the first row on the next line.

7. Click **Next Step** and Complete the **Criteria Response** grid. Enter the Text Response for each criteria.



Enter the following information:

Required Fields	Values
Text Response	For evaluation criteria "**PRICE**" enter "**$1150.00**"

Required Fields	Values
Text Response	For evaluation criteria **QUAL** enter "**Master Degree in Social work and extensive investigative training"**

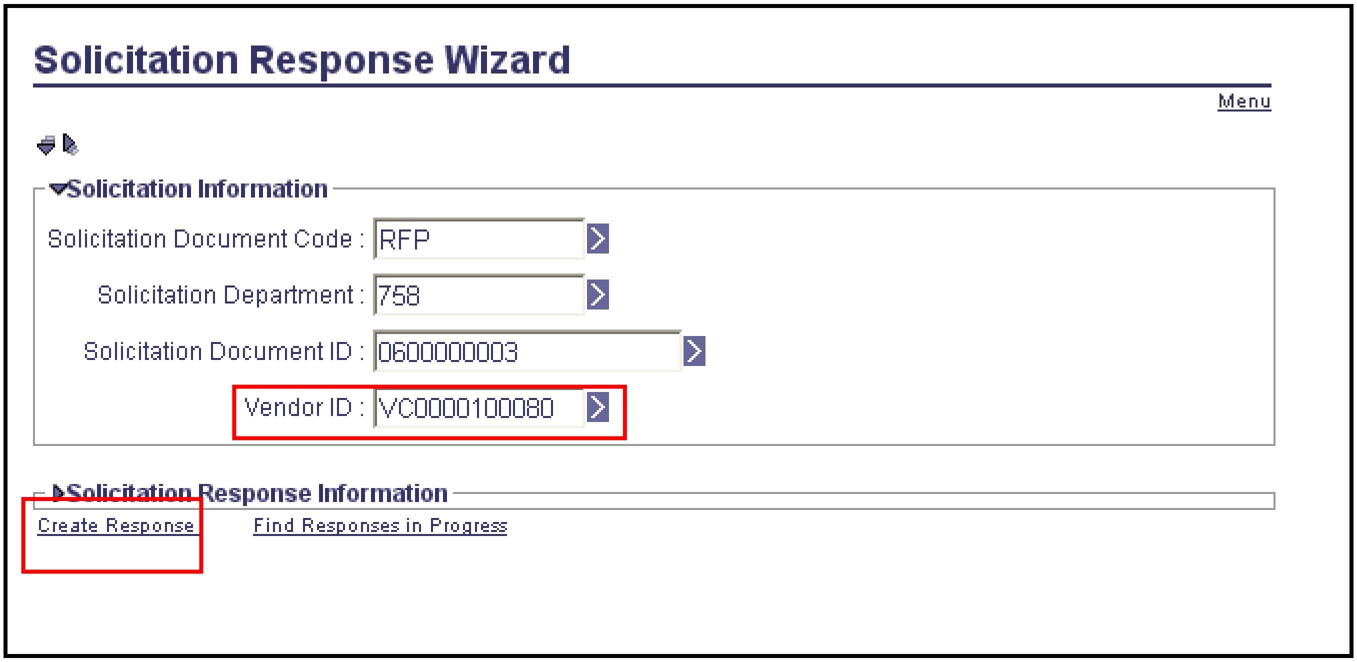
Required Fields	Values
Text Response	For Evaluation criteria **EXP** enter "**15 years**"

Required Fields	Values
Text Response	For Evaluation criteria **SOW** enter "**See Documentation on File**"

8. Click **Validate** and check for errors. After correcting any errors, click **Submit**.

9. Click **Close** and you will be returned to the **SRWZRD** page. You can enter a response for a new Vendor without retyping the Solicitation ID.

10. Record a second Vendor Response for Vendor Tactical Investigations. To select this second Vendor, delete the previous Vendor's code and enter: **"VC0000100080"**



11. Once the second **SRW** opens expand the Default Information and enter in the following information.

Required Fields	**Values**
Response Date	Enter **Today's Date**
Response Time	Enter a time that is before the Close Time listed in the Solicitation you created in Exercise 1.

12. Click **Next Step** and complete **Commodity Response** grid. Enter the required fields below.

Required Fields	**Values**
Response Type	Leave as defaulted.
Contract Amount	Enter: **$1200.00**
Comments (Optional)	Leave blank. NOTE: If the **Response Type** for any of the above line types is *no-bid* then you should only enter text in the **Comments** field; however, the system will not prevent you from entering data in the other fields.

13. Click **Next Step** and Complete the **Criteria Response** grid. Enter the Text Response for each criteria.

Enter the following information:

Required Fields	Values
Text Response	For evaluation criteria "**PRICE**" enter "**$1200**"

Required Fields	Values
Text Response	For evaluation criteria **QUAL** enter "**Master Degree in Social work and extensive investigative training**"

Required Fields	Values
Text Response	For Evaluation criteria **EXP** enter "**10 years**"

Required Fields	Values
Text Response	For evaluation criteria **"SOW"** enter **"SEE DOCUMENTATION ON FILE"**

14. Click **Validate** and check for errors. After correcting any errors, click **Submit**.

15. Click **Close** and you will be returned to the **SRWZRD** page.

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6 – Consolidate and Evaluate Vendor Responses on the EV document

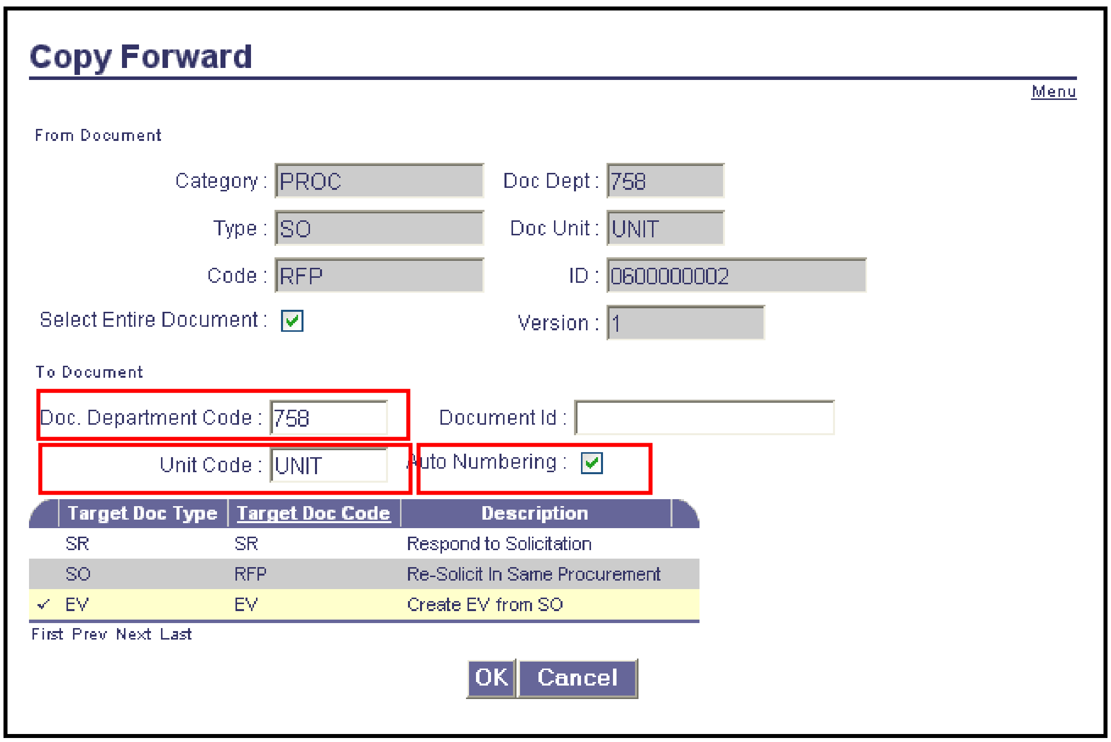
The **Evaluation** (**EV**) document allows you to view responses from Vendors for a specific solicitation. Much of the information on the **Evaluation** document defaults from the Solicitation document. The remaining information comes from the **Solicitation Responses** and from **Evaluator** documents.

The **Evaluation** document consists of a series of sections that display the information collected in various views and totals the scores collected from the **Evaluator** documents for the solicitation. The **Evaluation** document is used to issue awards.

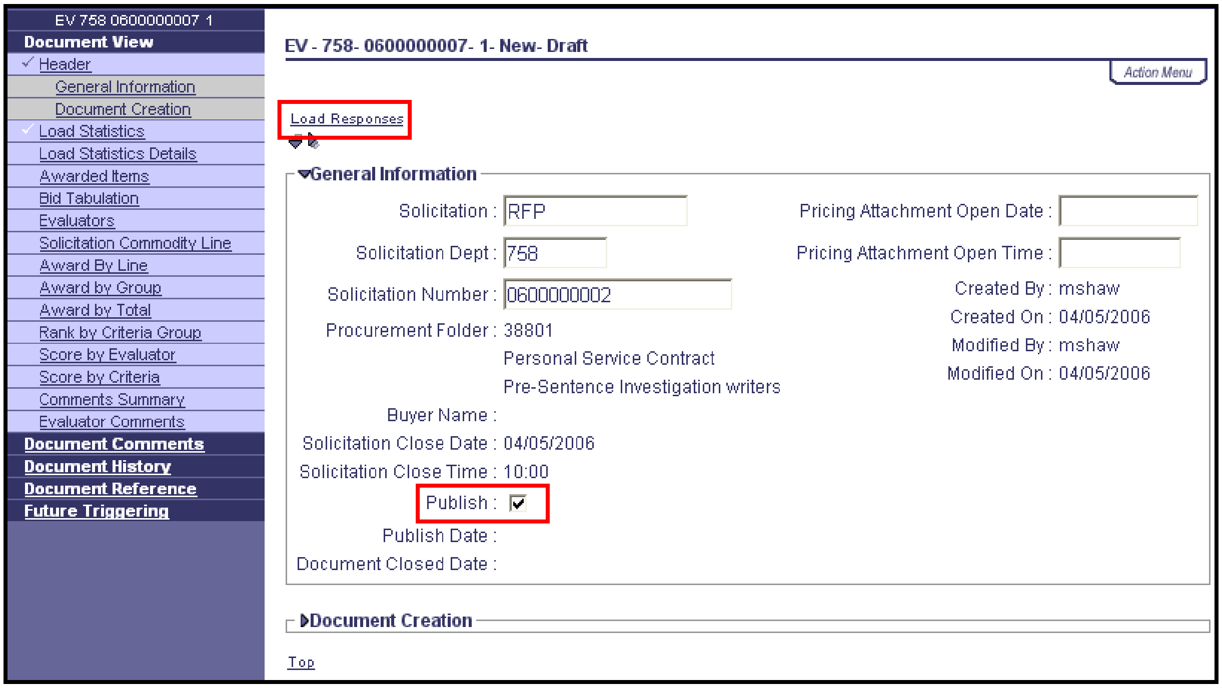
For off-line analysis, eMARS has the ability to generate a Bid-Tabulation in Microsoft Excel which can be printed.

The Evaluation Process

To create the **Evaluation** (**EV**) document you **Copy Forward** from a **Solicitation** to the **EV** document. Complete the **Document Department**, **Document Unit** and select **Auto-Document Numbering**.



<u>Load the Responses</u> into the Evaluation document. After the Closing Date has passed you may load all responses into the **EV** for inspection and analysis.

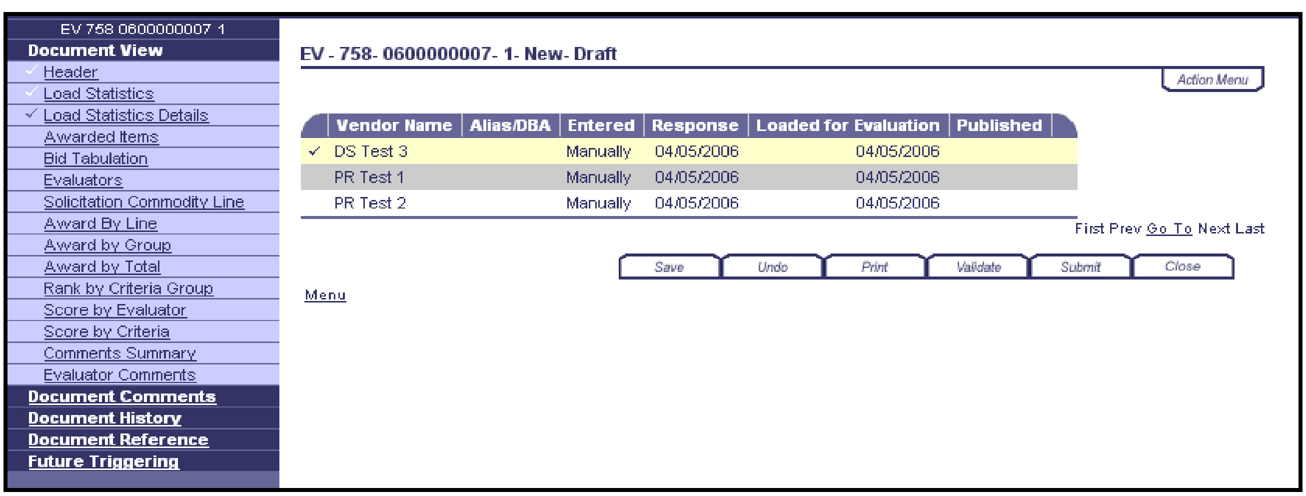


- Clicking on the **<u>Load Responses</u>** link will bring all **Solicitation Response** documents into the **EV**. This includes **SRW**, **SR** and Bids submitted through **Vendor Self Service**.

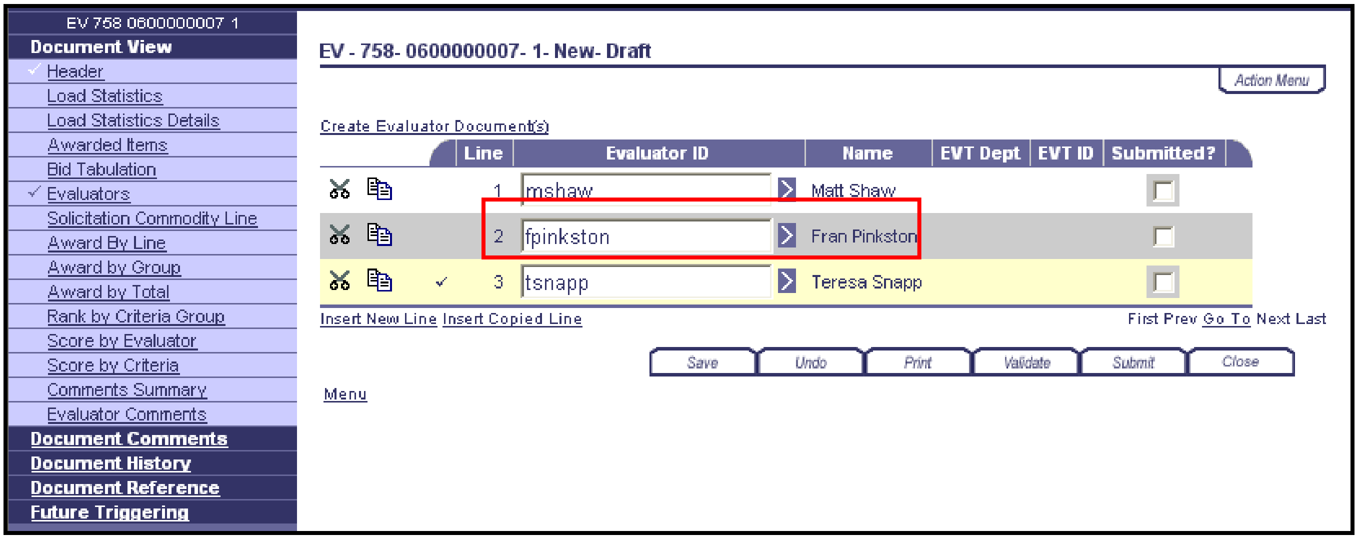
NOTE: Responses can only be loaded once the solicitation document has closed.

- The **Publish** check-box on the **EV** document is used to post Public Bid Opening information for a Solicitation document to **Vendor Self Service** (**VSS**).

Inspect the **Load Statistics Details** section to see all the Vendors who have responded and which bids have been loaded into the **EV**.



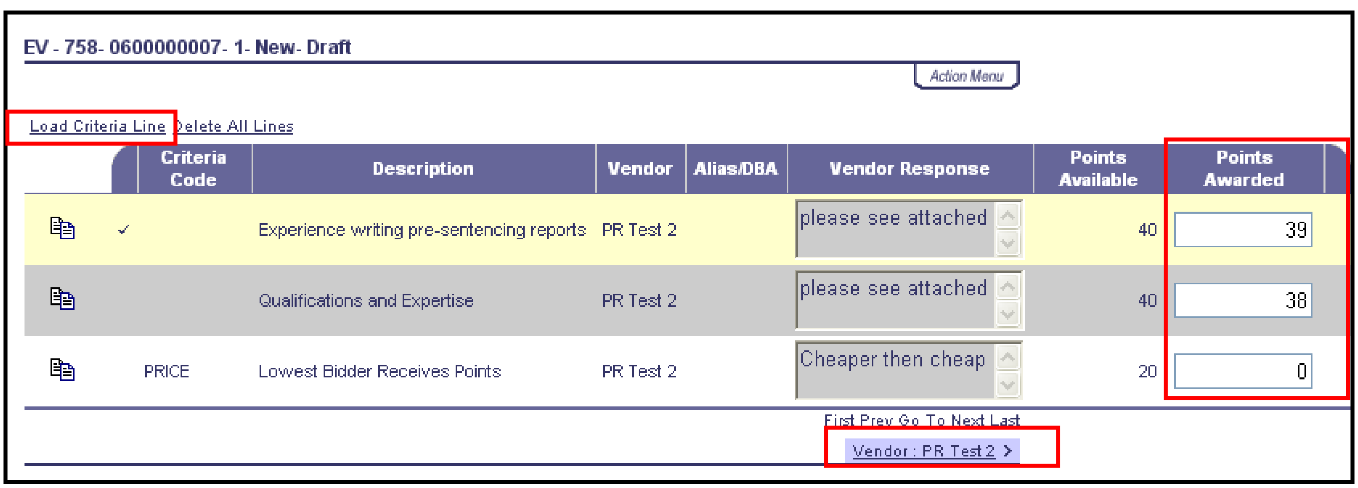
Build an Evaluation Team (optional). The Evaluator document allows you to establish a Bid-Evaluation team. The purpose of the team is to have experts in the field score and asses Vendor Responses for a given opportunity. Each user identified in the Grid will be sent an e-mail requesting them to completing an **EVT** document that they can locate from the Document Catalog.



- The **Evaluator ID** is the eMARS User-ID of the person selected to perform the evaluation.

Once the Users have been selected click **Create Evaluator Document**(s)

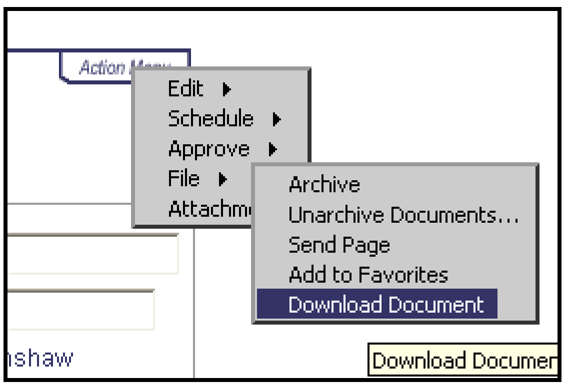
Score Vendor Responses to Evaluation Criteria on the **Score by Criteria** section. This page allows buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking on the **Load Criteria Line** link. An exchangeable grid is used to switch between Vendors. Evaluations that are entered via the **EVT** document will not display on this section. Click on the **Delete All Lines** action to delete all lines from this section.



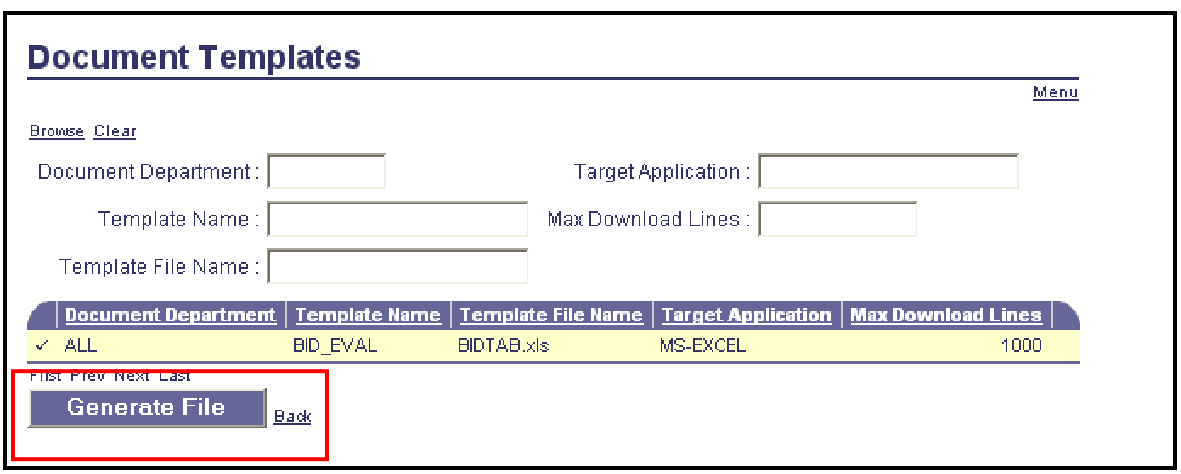
- Click on the **Load Criteria Line** link to load in all of the Vendors' responses to Evaluation Criteria.
- Use the **Vendor:** link to toggle between Vendors and score each Vendor's responses.
- Use the **Points Awarded** field to establish a score for each Vendor's Evaluation Criteria response.

Download all Bids into the MS-EXCEL Bid-Evaluation Template. From the **Action Menu**, click on **File**>>**Download Document**.

NOTE: Excel Macros must me Enabled to generate the Bid-Evaluation Template. Please check the Macro Security before generating the template.



Generate the Bid Tabulation Spreadsheet. Select the **BID_EVAL** template and click on the **Generate File** button.



Inspect the Bid-Tabulation spread-sheet. MS-EXCEL will open with the data from the Vendor's responses tabulated.

The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

	PR Test 1	PR Test 2	DS Test 3
Line 1	1200	2500	3200
Total Bid	1200	2500	3200

The **Line Item Group** worksheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be grouped together and then sorted lowest to highest.

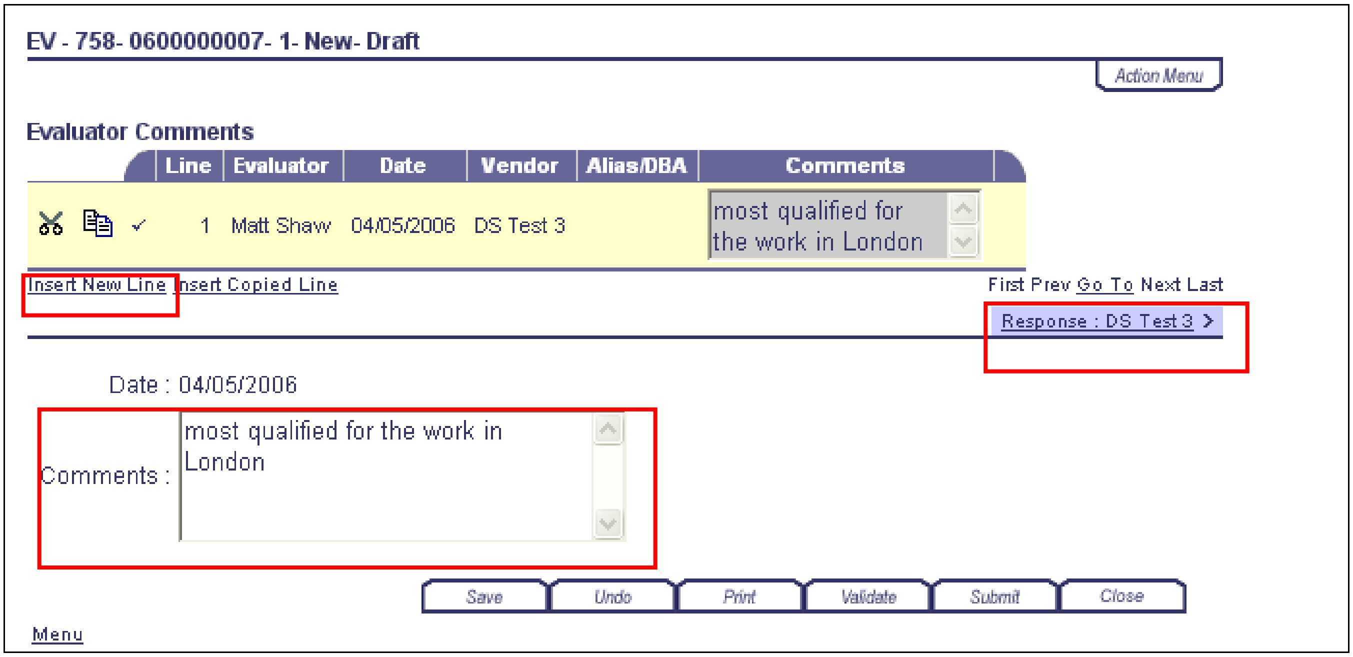
Group No	Group Name	Vendor Name	Bid/No Bid	Group Total Cost
1	Services	PR Test 1	Bid	1200.00
1	Services	PR Test 2	Bid	2500.00
1	Services	DS Test 3	Bid	3200.00
2	Travel	DS Test 3	Bid	0.00
2	Travel	PR Test 1	Bid	0.00
2	Travel	PR Test 2	Bid	0.00

The **Line Item** worksheet consolidates all Vendor Responses on a Commodity Line by Commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order (e.g. lowest to highest).

Line #	Line Item Type	Vendor	Bid / No Bid	Vendor Comments	Line Description	Contract Amount	Line Item Total
1	Service	PR Test 1	Bid		PSI Writer District 10	1200.00	0.00
1	Service	PR Test 2	Bid		PSI Writer District 10	2500.00	0.00
1	Service	DS Test 3	Bid	Low price bid	PSI Writer District 10	3200.00	0.00

Save the MS-EXCEL file to your local file system. You may attach the Bid Tabulation to the Evaluation document for future reference.

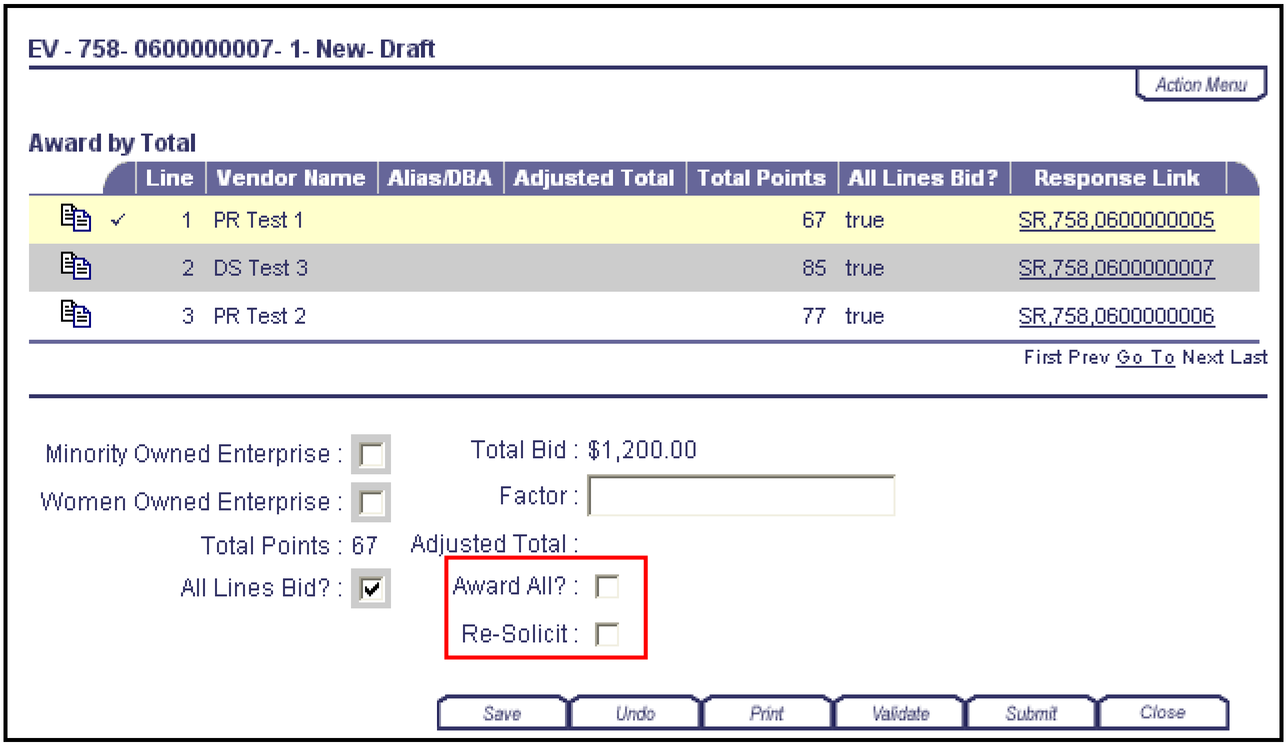
Record an Award Justification for each Vendor receiving an award on the **Evaluator Comments** section. At least one comment must exist for all Vendors selected for award. If a comment does not exist an error will be received upon attempted creation of the award document.



- **Comments Box**- Record your award justification in this box.
- Click the **Response: Vendor** link to toggle between Vendors.

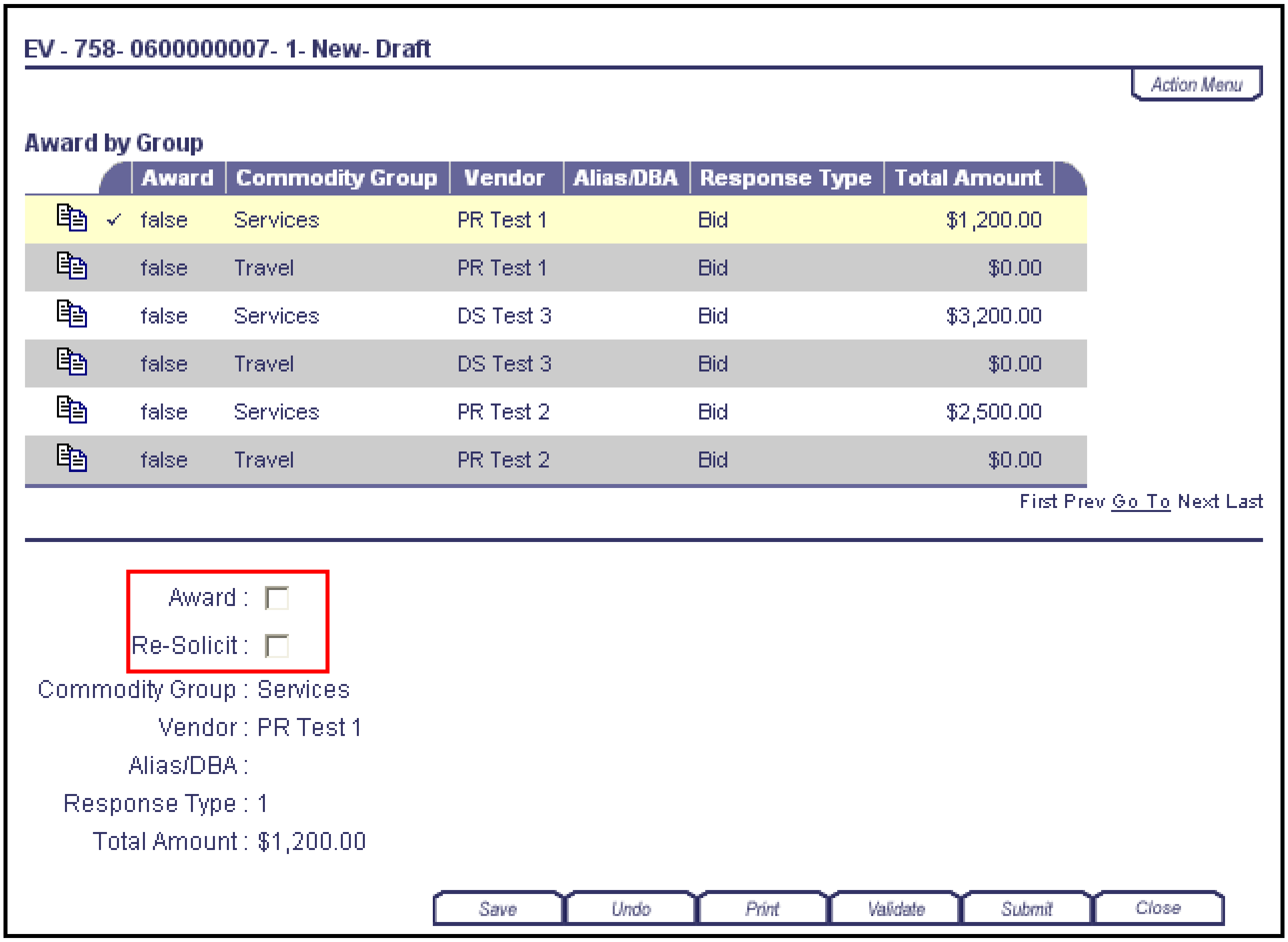
Choose how the award will be generated. Awards can be generated one of three ways: Award by Total, Award by Group or Award by Line. You will need to complete only one of these sections to determine who will be granted the award.

If you are awarding the total document to a Vendor you will choose the **Award by Total** section. Award all line items to a Selected Vendor by choosing the Vendor in the Grid section and selecting the **Award All?** check-box. After making the selection in this section, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.



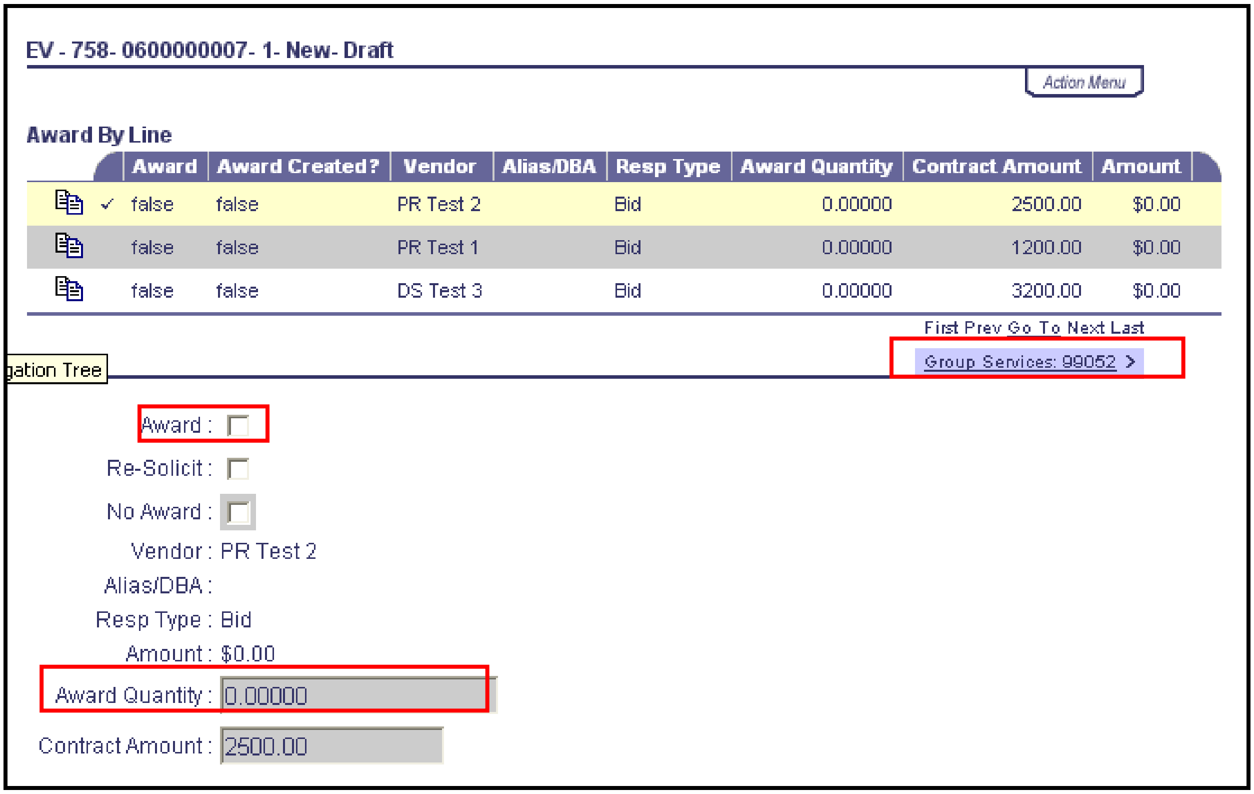
- Selecting the **Award All?** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all Commodity Lines on the Solicitation.
- Selecting the **Re-Solicit** check-box indicates that no award will be created.

If you are awarding by Commodity Group(s) you will choose the **Award by Group** section. In the Grid section, select a Group and Vendor with which to create an Award. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.



- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the grid section for all Commodity lines in the selected Commodity Group.
- Selecting the **Re-Solicit** check-box indicates that no award will be created for the Commodity Group in question.

If you are awarding Commodity Line(s) to a Vendor you will choose the **Award by Line** section. In the Grid section select a Vendor with which to create an Award. To select a different line for award, click on the link at the bottom of the grid. After making the selection, transition to the **Header**, expand the **Document Creation** section, and generate the Award document.

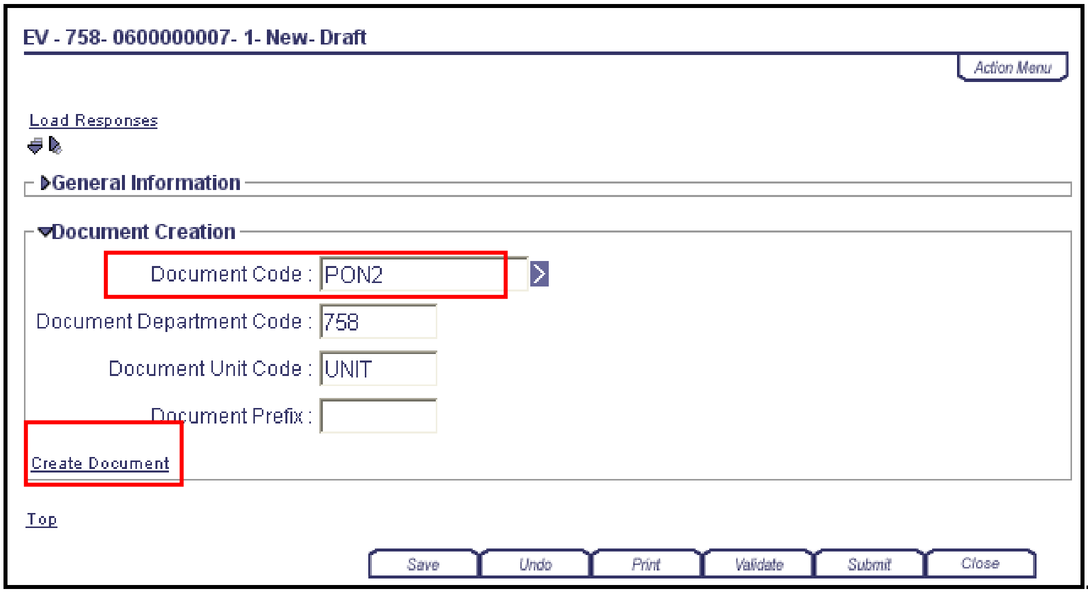


- Selecting the **Award** check-box indicates that you would like to create an award for the Vendor selected in the grid section for the selected Commodity lines.
- The **Award Quantity** is used to split how many individual units of quantity are being awarded. You may award over the total quantity of the Solicitation line.

Generate the Awards one Vendor at a time from the **Document Creation** section in the **EV** Header. When an award is generated from the **EV** it will take information from several places:

- **Terms and Conditions** and **Supporting Documents** will be copied from the Solicitation.
- Accounting information will be copied from a referencing Requisition (**RQS**), if it exists.
- Pricing will be taken from the Vendor's bid as recorded on the Solicitation Response **(SR/SRW)** document.
- The Vendor will be taken from the Solicitation Response (**SR/SRW**) Document.

NOTE: Award documents with Accounting consequences that reference a Requisition will be generated with a **memo** Commodity and Accounting line reference back to the Requisition.



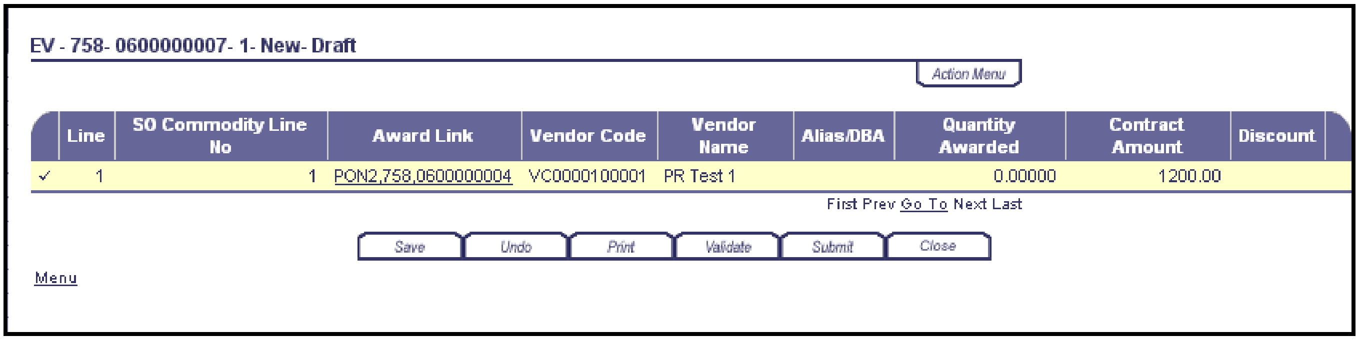
- The **Document Code** field allows users to select the target document code that will be created. For **PSC**/**MOA** please enter **PON2** only. Clicking **Create Document** will create the document for the Vendor and line items selected on **Award by Total**, **Award by Group** or **Award by Line** sections.

NOTE: A single Solicitation line may not be awarded twice to the same Vendor.

NOTE: Only one Award may be created at a time. Every time the **Create Document** link is clicked, the **Award by Total**, **Award by Group** or **Award by Line** sections may only have selections made for a single Vendor.

Inspect the **Awarded Items** section to track how each line was awarded. You may open the Generated documents by clicking on the **Hyperlink Document ID**.

NOTE: If an item is deleted from a generated award it will correspondingly be deleted from this inquiry.



EV - 758- 0600000007- 1- New- Draft

Action Menu

	Line	SO Commodity Line No	Award Link	Vendor Code	Vendor Name	Alias/DBA	Quantity Awarded	Contract Amount	Discount
✓	1	1	PON2,758,0600000004	VC0000100001	PR Test 1		0.00000	1200.00	

First Prev Go To Next Last

Save Undo Print Validate Submit Close

Menu

When the Awards that were generated from the **EV** have been Submitted to Final, you will return to the **EV** document and submit it to final as well. This action will trigger the upload of award information to Vendor Self Service (**VSS**).

How to print the EV document:

Navigate to each section of the document starting at the Header section. Open up each field of the document that you want to view on your printed document. Once you have the fields open, right click on your mouse and select **Print Page**

Exercise 3 – Evaluate and Tabulate Vendor Responses to the RFP using the EV document and Excel document download.

Award a Personal Service Contract from the EV document

Scenario

You need to evaluate and compare the Bids that came in for the **RFP** for Investigation Services you created in Exercise 1 and the Responses you created in Exercise 2. You need to award a **Personal Services Contract** (**PSC**).

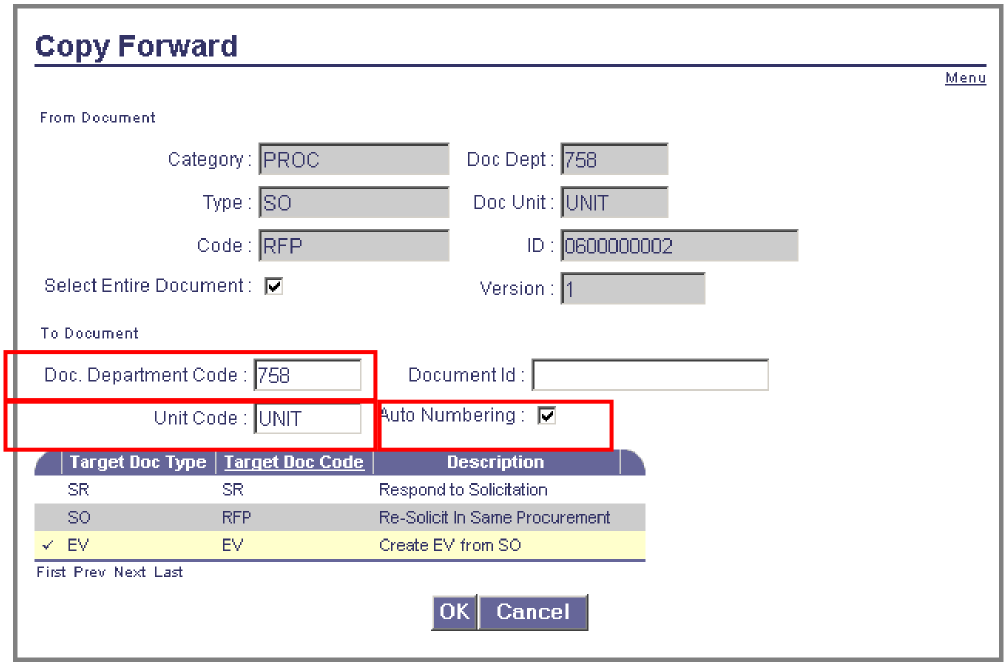
Task Overview

You will access the **RFP** you created in Exercise 1 from the Document Catalog. You will **Copy Forward** from the **RFP** to an **EV** document. When the **EV** is created you will load in all of the responses. You will inspect and score the Vendor's responses to your **Evaluation Criteria**. You will download the **EV** document into a Bid-Tabulation Spreadsheet. You will record an Award Justification using the **Evaluator Comments** section for the Vendor being awarded the Contract. You will award the **Personal Service Contract** (**PON2**) from the **EV**. Once the contract has been generated, you will access it from the awarded items inquiry, add additional required information, and **Submit** it to final. Once the award has been submitted to final, you will return to the **EV** document and **Submit** it to final as well.

Procedures

1. Access the **Document Catalog** and open the **RFP** you created in the previous Exercise 1. If you have not logged out since it was created you may open your **History** to find a hyper-link to the document. Click **Home,** Click **Search,** Click **Documents Catalog**, Enter the **Document ID** of the Solicitation from Exercise 1.

2. After opening the document, Click **Copy Forward** from the **RFP** created in Exercise 1 to the **EV** document..



3. Click the **EV** line in the grid
4. Enter the following required fields:

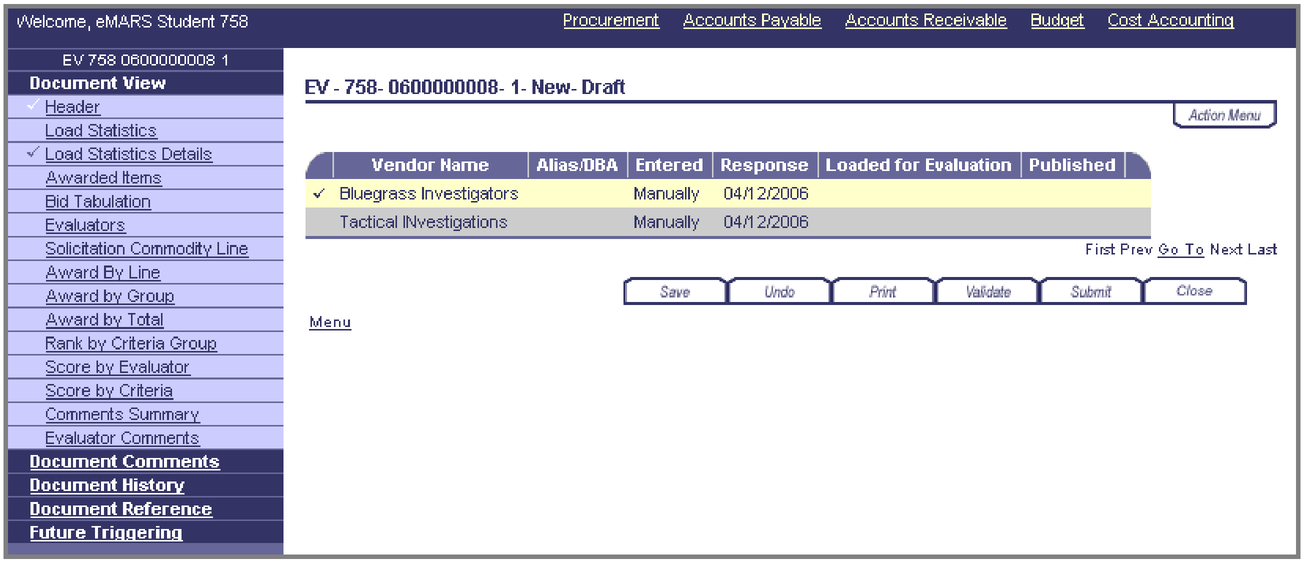
Required Fields	Values
Doc. Department Code	**See Student Card**
Unit Code	**UNIT**
Auto-Numbering	**Select the check box.**

5. Click **OK**. An **Evaluation** document (**EV**) is created.

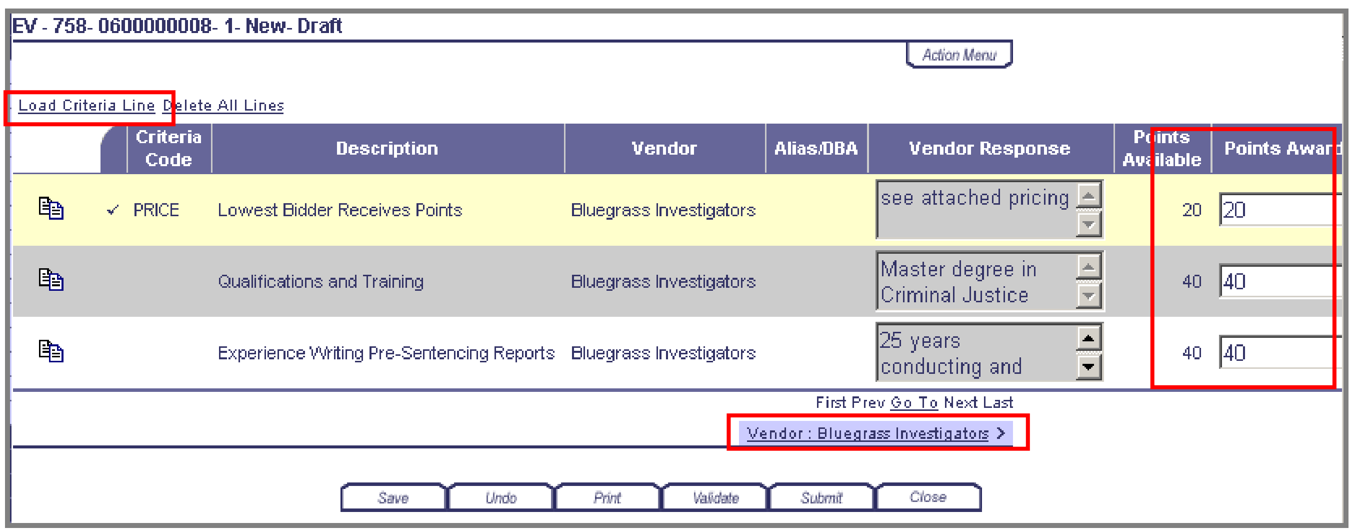
6. Click **Load the Responses** to bring all Solicitation Response (**SR**) documents into the Evaluation Document (**EV**). This includes **SRW**, **SR** and Bids submitted through **VSS**.

NOTE: By selecting the Publish box in the EV document you are consenting to post all received bids from the solicitation to the Vendor Self Service (VSS) website. If you do not want this information to be posted to the public, do not select the Publish box in the Header of the EV document.

7. Click **Load Statistics Details** on the Secondary Navigation Panel. Review this section to see all the Vendors who have responded and which bids have been loaded into the **EV**.



8. Click **Score by Criteria** on the Secondary Navigation Panel. This page allows Buyers to view and score the Vendors' criteria responses directly on the **EV** document by clicking **Load Criteria Line**. An exchangeable grid is used to switch between Vendors. Evaluations that are entered via the **EVT** document will not display on this section.



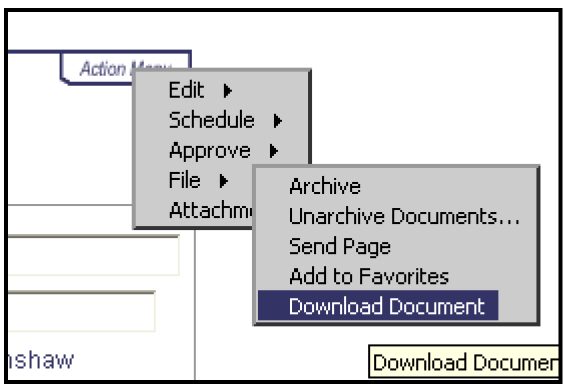
9. Click **Load Criteria Line** to load in all of the Vendors' responses to the Evaluation Criteria.

10. Score Vendor Responses to Evaluation Criteria. Use the **Points Awarded** field to establish a score for each Vendor's Evaluation Criteria response. Enter the following scores for each Vendor. To toggle between Vendors and score each Vendors' responses, click the **Vendor:** link below the grid.

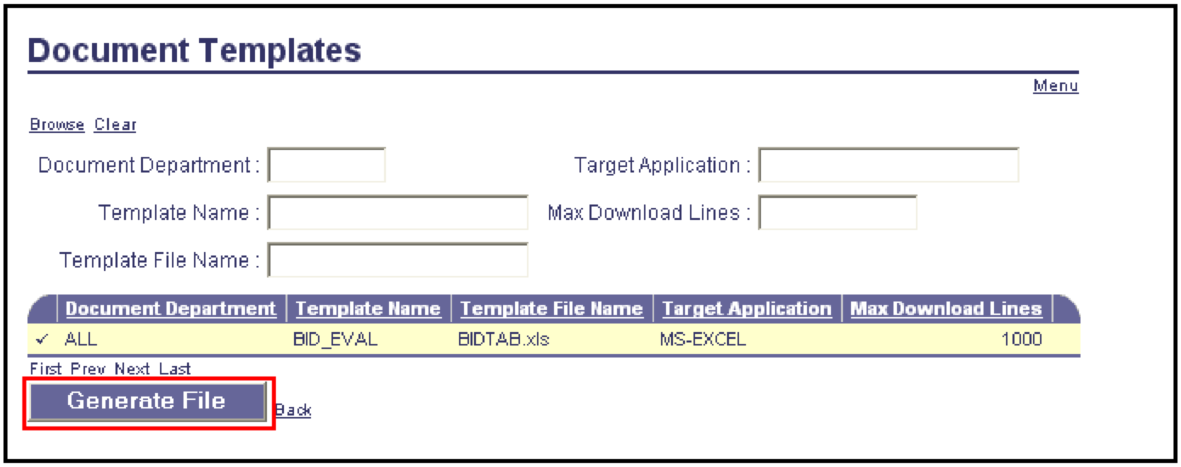
Required Fields	Values
Points Awarded	**Vendor: Bluegrass Investigators** **PRICE: 20** **QUAL 40** **EXP 40** **SOW 50**
	Vendor: Tactical Investigations **PRICE: 15** **QUAL 40** **EXP 30** **SOW 40**

11. From the **Action Menu**, click on **File**>>**Download Document** to download all Bids into the MS-EXCEL Bid-Evaluation Template.

NOTE: Excel Macros must me Enabled to generate the Bid-Evaluation Template. Please check the Macro Security before generating the template.



12. To generate the Bid Tabulation spreadsheet, select the **Bid Evaluation** template and click **Generate File**.



13. When given the option to **Open** or **Save** the file, click **<u>Open</u>** on the windows dialog box.

14. The MS-EXCEL opens with the data from the Vendor's responses tabulated. Inspect the Bid-Tabulation spreadsheet.

   a) The **Total Bid** worksheet displays Vendors ranked lowest to highest based on the total cost of their bid. The lowest Vendor will be placed on the left and the highest will be on the right.

	A	B	C	D	E
1		Bluegrass Investiga	Tactical INvestigations		
2	Line 1	1150	1300		
3	Total Bid	1150	1300		
4					
5					

   b) The **Line Item Group** work sheet consolidates all Vendors responses on a Commodity Group basis. Vendors' Responses to each group will be grouped together and then sorted lowest to highest.

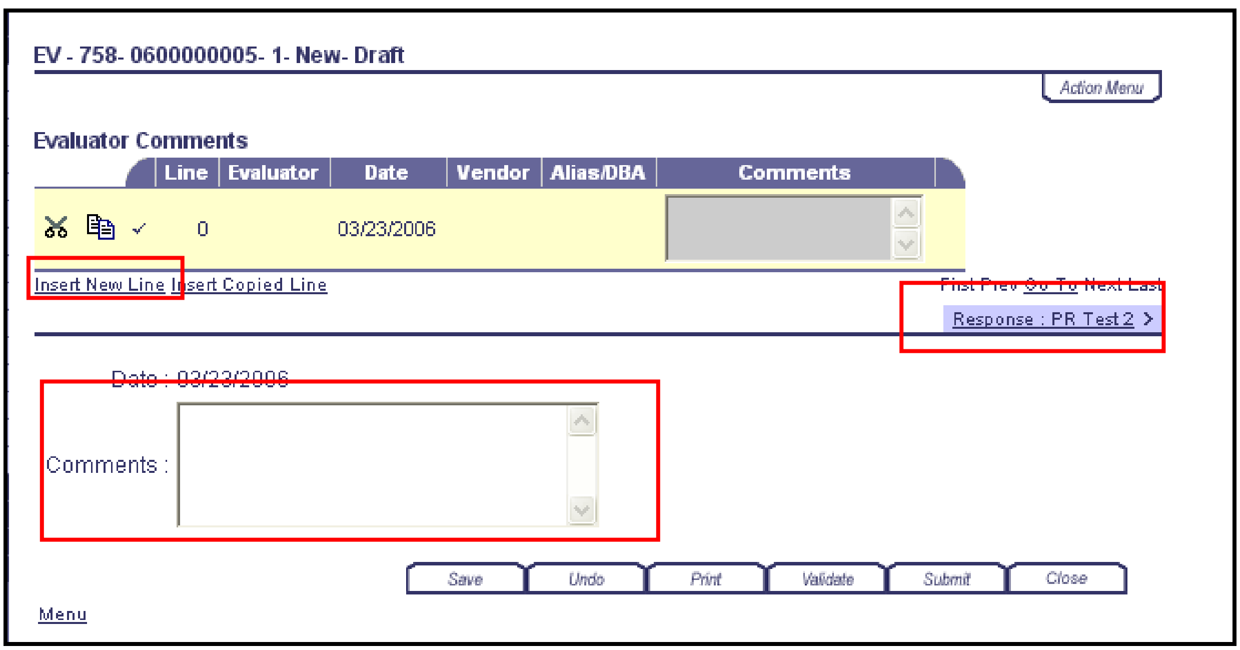
	A	B	C	D	E
2	Group No	Group Name	Vendor Name	Bid/No Bid	Group Total Cost
3	1	Services	Bluegrass Investigator	Bid	1150.00
4	1	Services	Tactical INvestigations	Bid	1300.00
5					
6					

   c) The **Line Item** work sheet consolidates all Vendor Responses on a Commodity line by Commodity line basis. All responses to the same line item are grouped together and then sorted in ascending order (e.g. lowest to highest).

Line #	Line Item Type	Vendor	Line Description	Bid Qty	Bid UOM	Unit Price	Contract Amount	Discount %	Line Item Total
*									
1	Service	Bluegrass Investigators	PSI Writer District 10	0.00000			1150.00		0.00
1	Service	Tactical INvestigations	PSI Writer District 10	0.00000			1500.00		0.00

15. Close MS-Excel and return to the **EV** document.
16. From the **Document Templates** page, click the **Back** link.
17. Click **Evaluator Comments** on the Secondary Navigation Panel. You must record an Award Justification for the Vendor receiving an award on the **Evaluator Comments** section prior to the creation of the award document. If a comment does not exist, you will receive an error message when you attempt to create the award document.

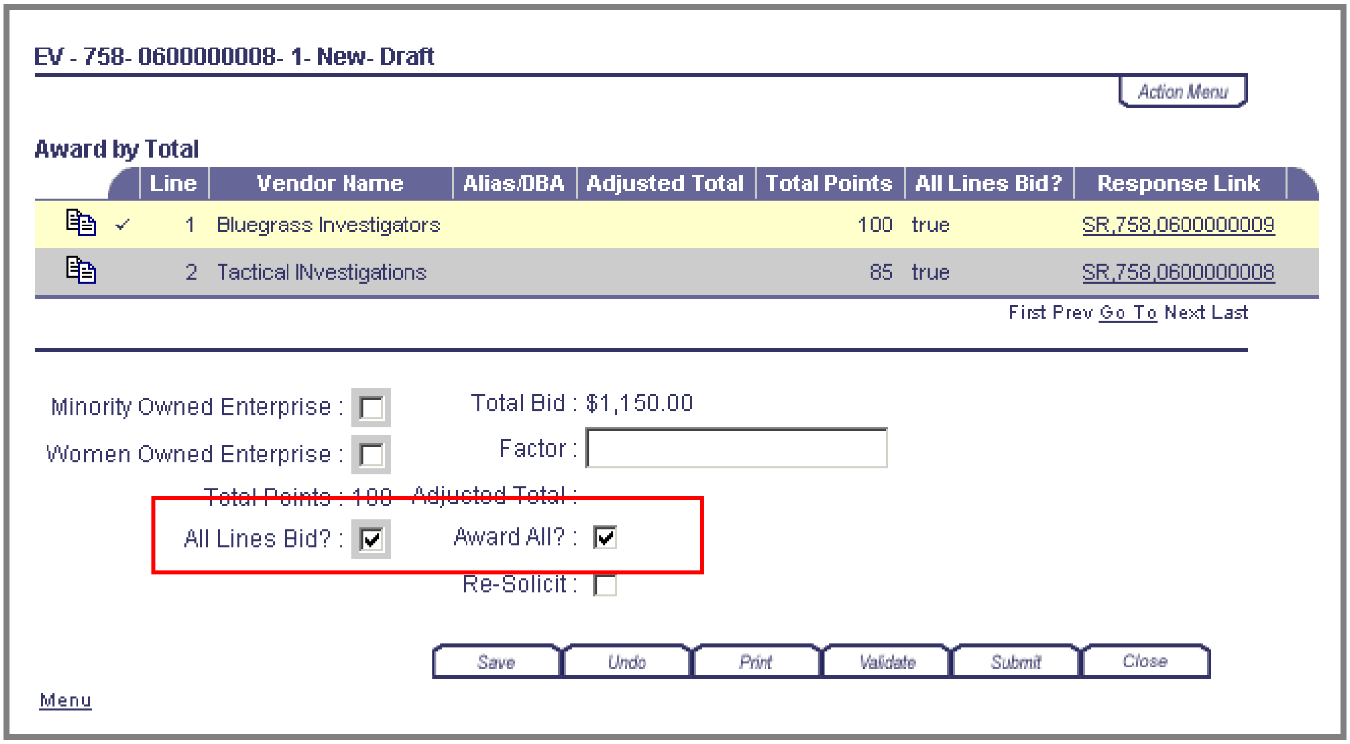
NOTE: When you initially transition to this page the Comments field will not be disabled. (e.g. you will be able to type information in that field. HOWEVER, the text will not be saved unless you have inserted a new line).



18. Click **Insert New Line** and enter the following required fields:

Required Fields	Values
Comments	Enter "**Recommend Bluegrass Investigators**".

19. Click **Award by Total** link on the Secondary Navigation Panel.

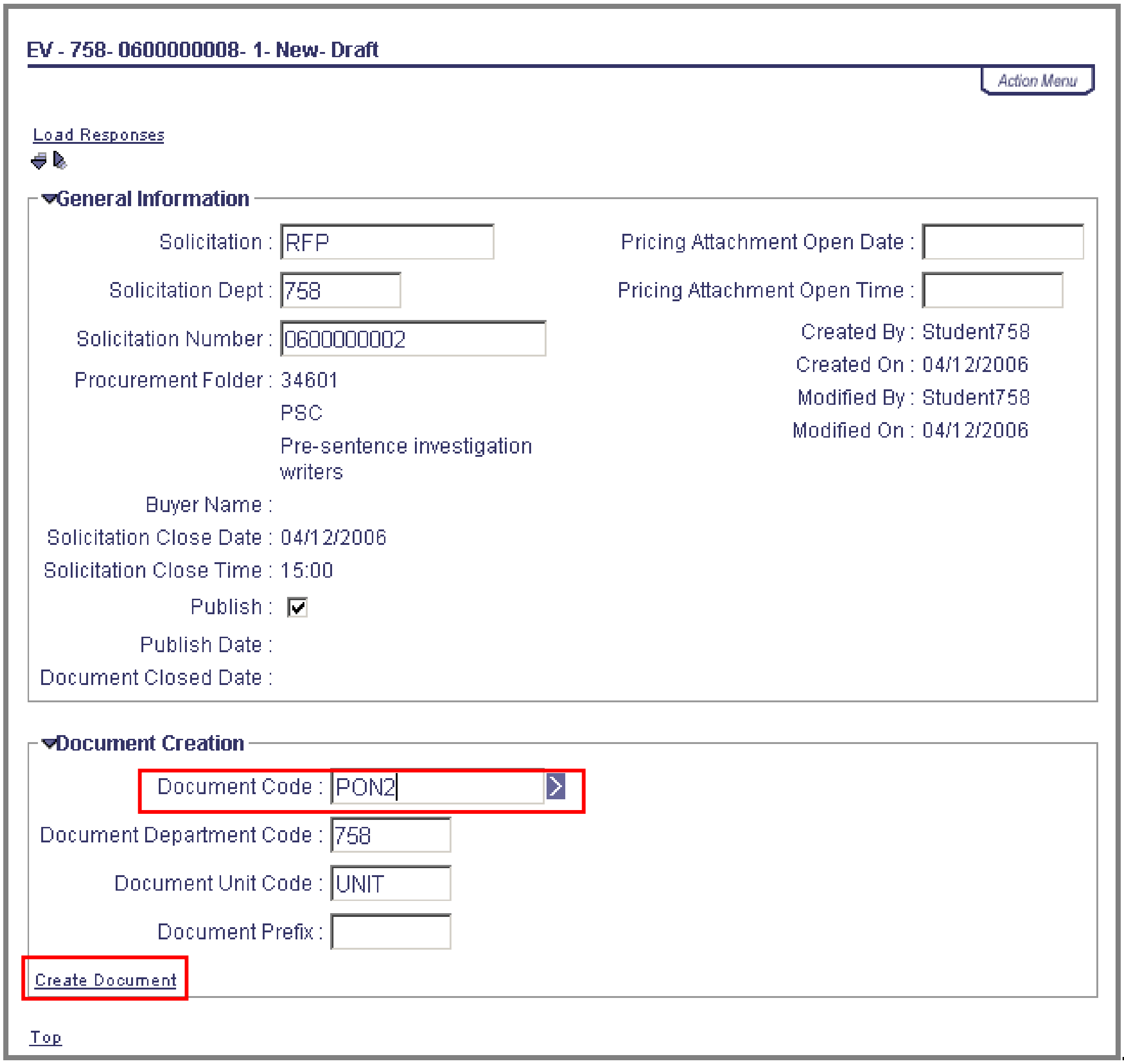


20. Award all line items to **Bluegrass Investigators** by selecting the **Award All?** check-box.

Required Fields	Values
Award All?	**Select the check-box**
Re-Solicit	**Leave blank.**
All Lines Bid?	**Leave checked.**

21. Click **Header** on the Secondary Navigation Panel.

22. Expand the **Document Creation** section to generate the Award Document.



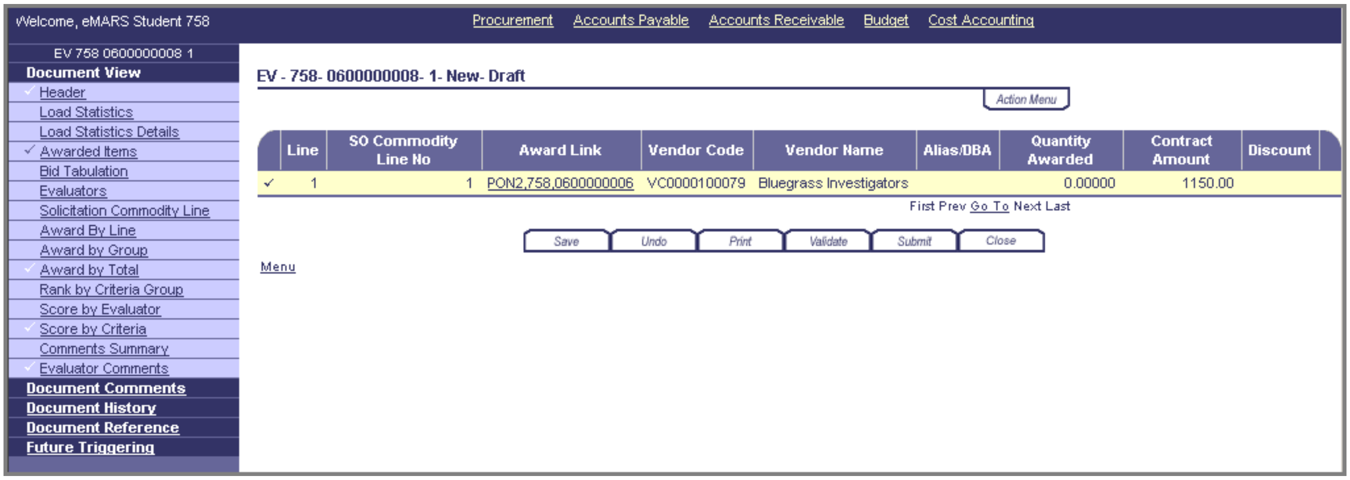
23. Enter the following required fields:

Required Fields	Values
Document Code	Select "**PON2**".

24. Click **Create Document** to create the Award document for the Vendor and line item(s) selected on **Award by Total**, **Award by Group** or **Award by Line** sections.

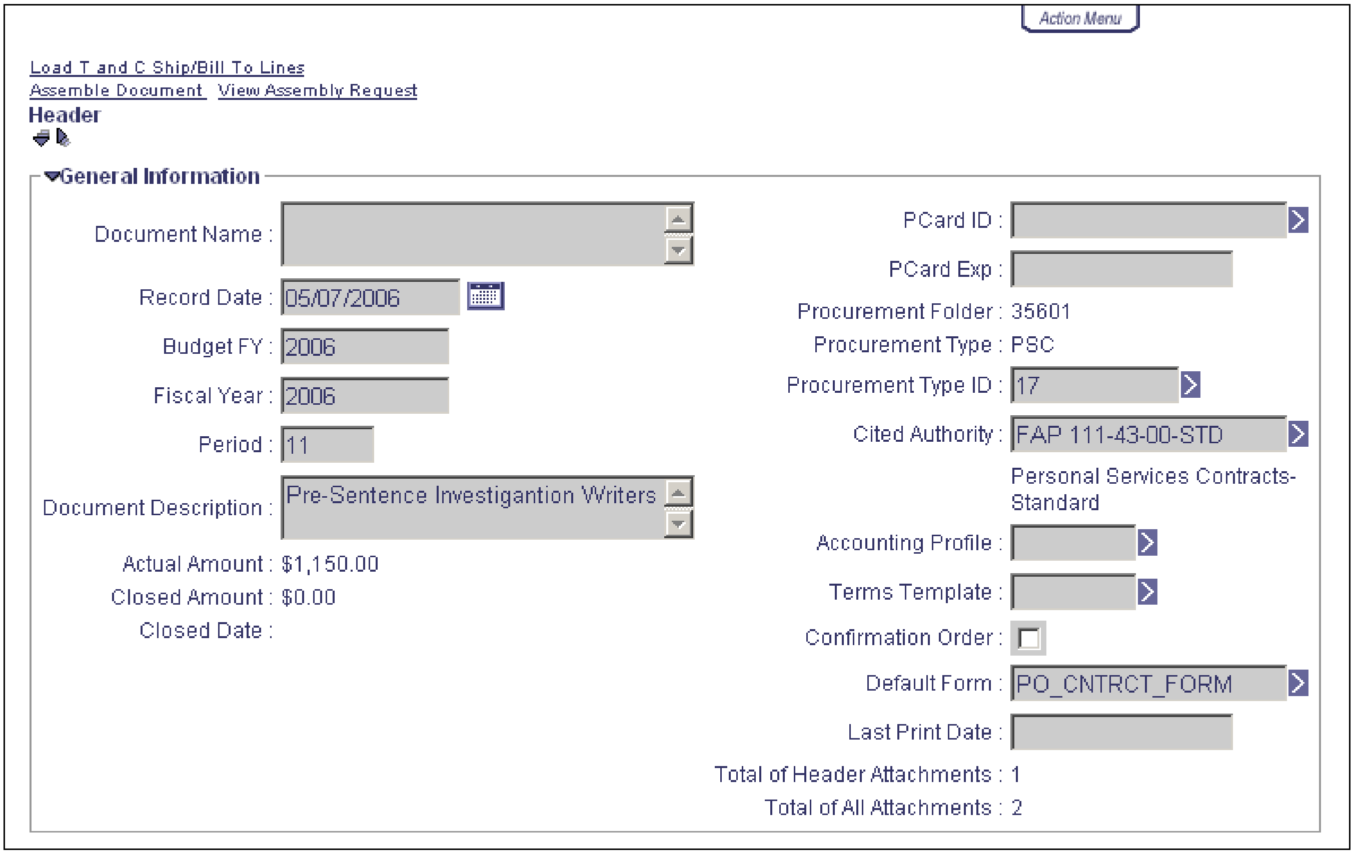
25. Click **Awarded Items** on the Secondary Navigation Panel. This view allows you to inspect how each line was awarded. You may open the generated documents by clicking the **Hyperlink Document ID**.

NOTE: If an item is deleted from a generated award it will correspondingly be deleted from this Inquiry.



Please wait before going on with the exercise.

26. Click the **Award Link** to open the **PON2** document just created. The **PON2** document opens to the **Header** section.



27. Click **Edit** at the bottom of the page to add required information to the **PON2**.

28. In the General Information section of the **Header**, enter the following required fields:

Required Fields	Values
Procurement Type ID	Select "**17**" from the pick list.
Cited Authority	Select **FAP 111-43-00-STD** from the pick list.
Default Form	Enter: **PO_CNTRCT_FORM** (If processing a modification, choose the MOD_CNTRCT_FROM).

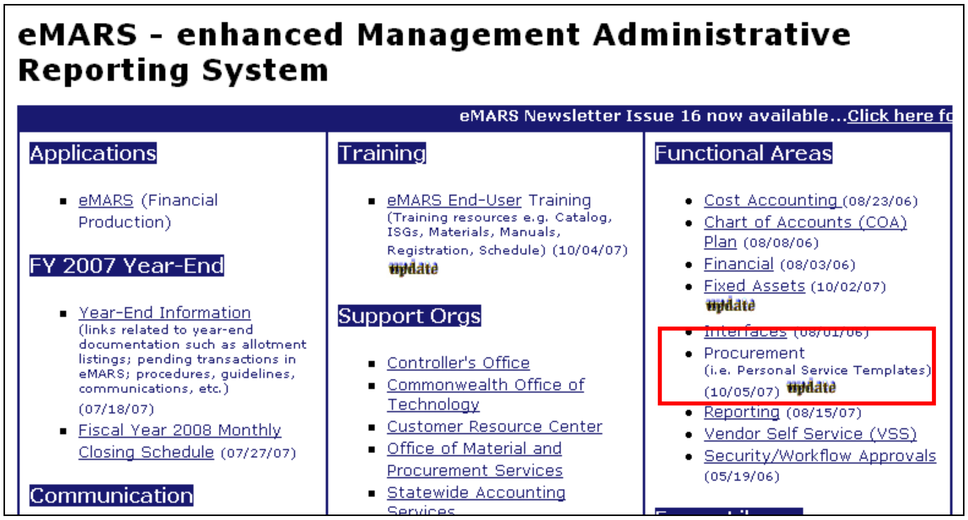
29. Open the **Contact** section and note that the information defaulted from the **EV** document.

30. Click on **Vendor** in the Secondary Navigation Panel and note the vendor information defaulted from the **EV** document.

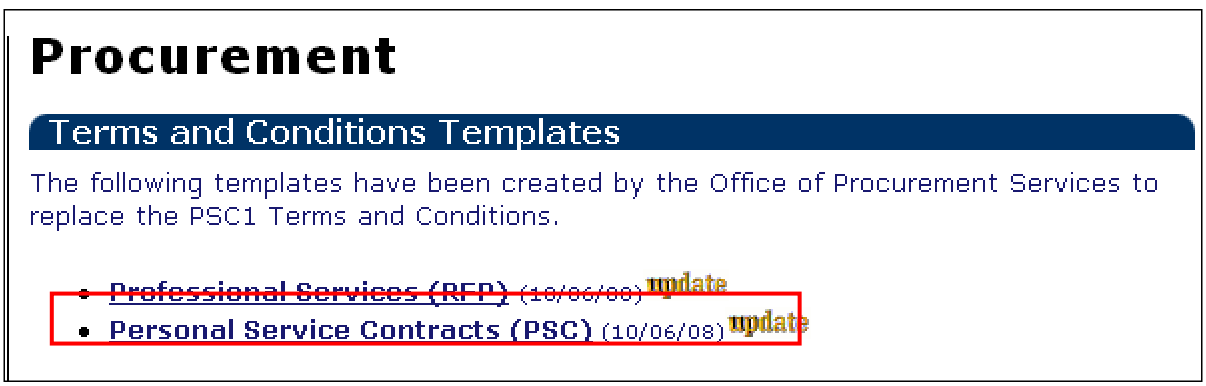
31. Click on **Terms and Conditions** in the Secondary Navigation Panel and note the **Free Form Terms and Conditions** that defaulted from the **EV** document. When the Free Form Terms and Conditions defaults from the Solicitation the attachment associated is the same attachment used in the solicitation document. You will need to delete this attachment and upload your own attachment to be incorporated into your final contract. Users will need to download a copy of the Personal

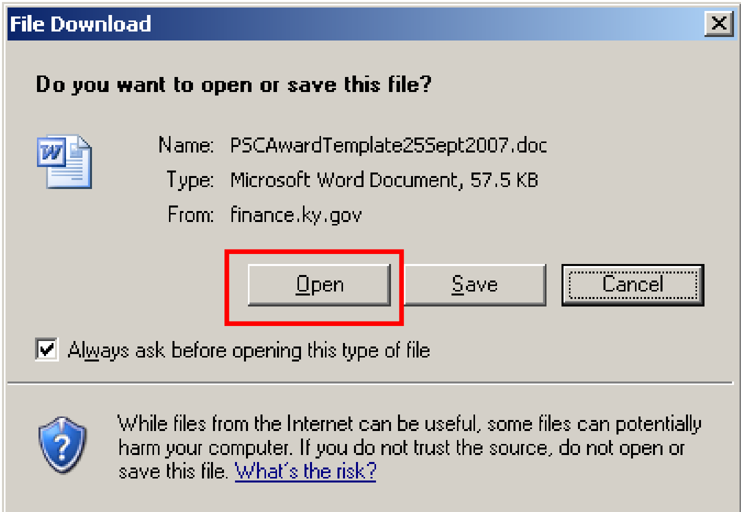
Service Contract Terms Template from the eMARS website and modify it to appropriately reflect the PON2.

32. Navigate to the **eMARS website** and click on the **<u>Procurement Functional Area</u>**.



33. Select the **<u>Professional Service Contracts</u>** template and **<u>Open</u>** a copy of the template to your desktop.

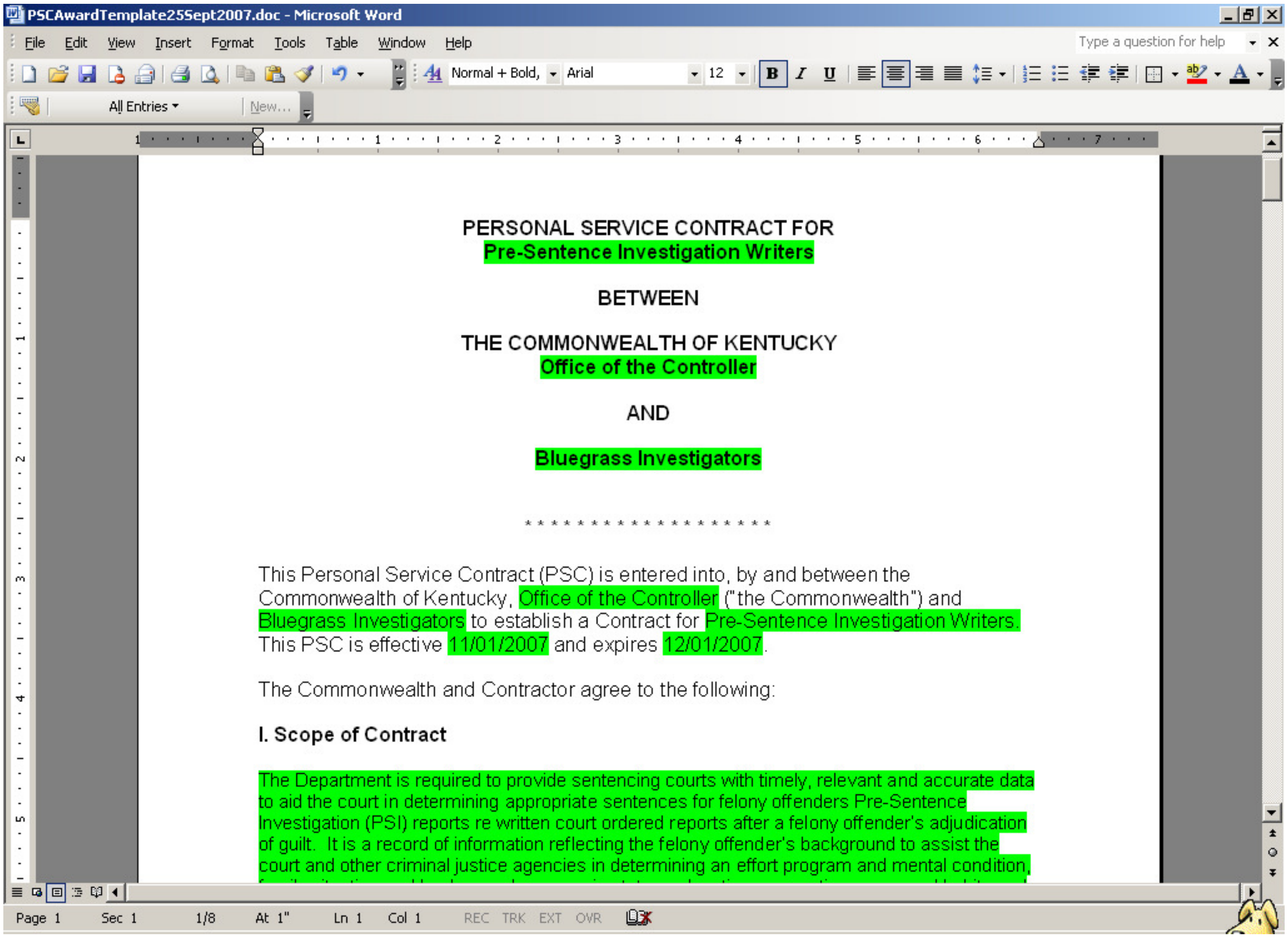




34. <u>Modify only the highlighted sections of the document to make it specific to the Personal Service Contract and the issued Request for Proposal.</u>

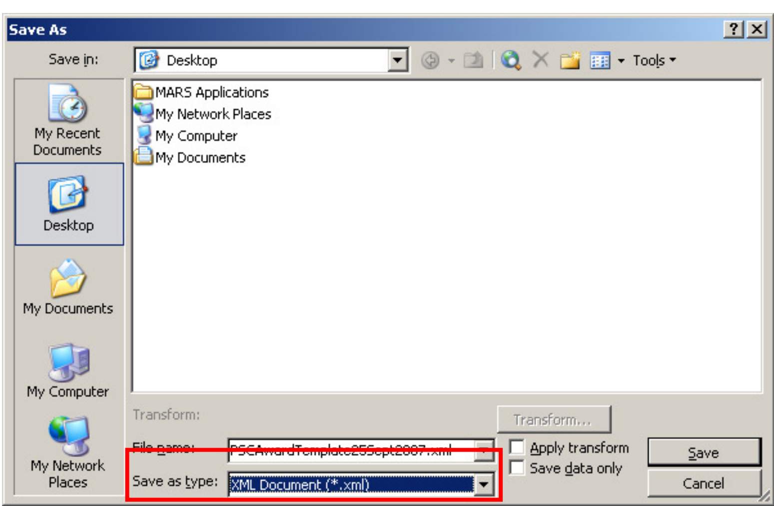
Enter the following into the appropriate fields:

Required Fields	Values
RFP Title	Enter: **"Pre-Sentence Investigation Writers"**
Agency	Enter: **"Office of the Controller"**
Vendor	Enter: **"Bluegrass Investigators"**
Scope of Contract	Enter: **"The Department is required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offender's……**



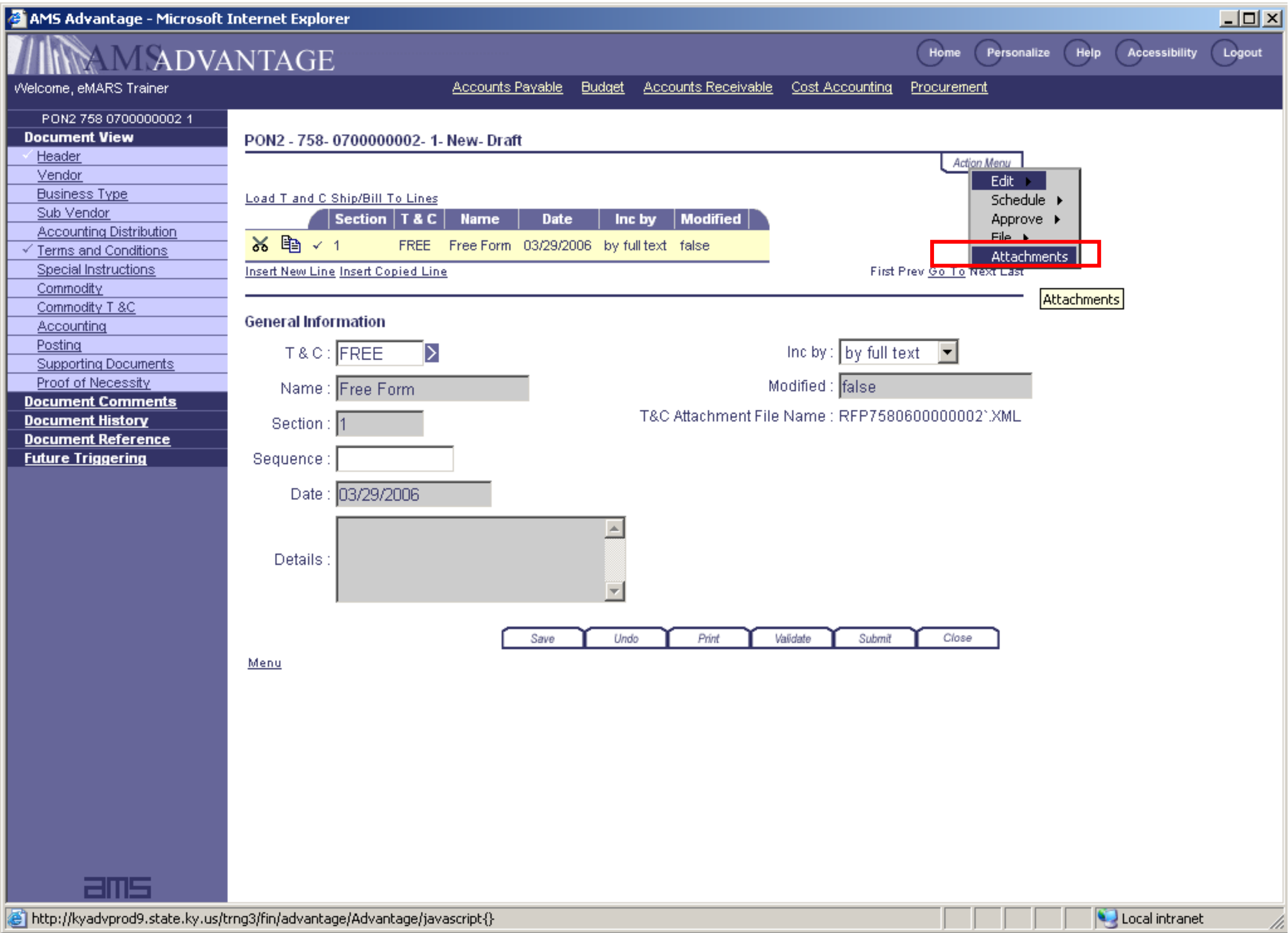
35. Remove all highlighting from the document by selecting all the text (Ctrl + A) and select the highlight from the toolbar.

36. Once all the changes have been made to the document save it to your desktop as an .**XML**. and close the file.



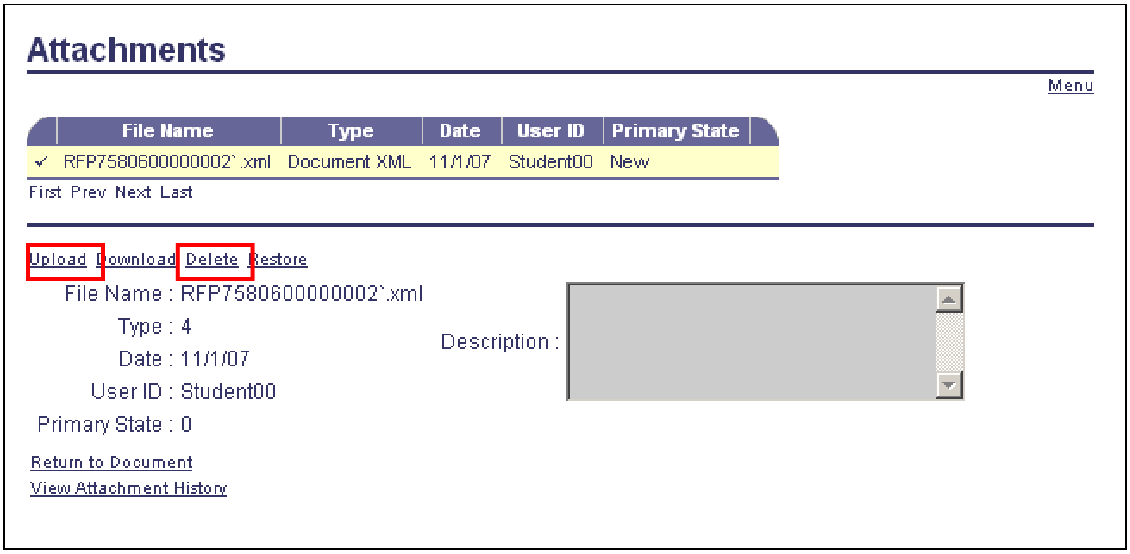
37. Return to the **Terms and Conditions** section of your **PON2** document.

38. Click the **Attachments,** link from the **Action Menu.**



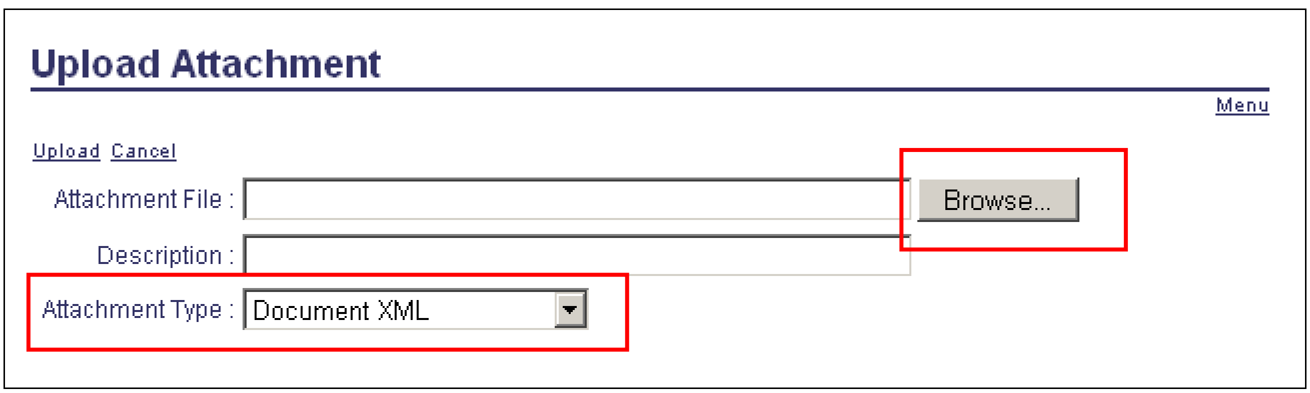
39. The **Attachment** page opens. Click **Delete** to discard the *Terms and Conditions* associated with the *Request for Proposal* document. Once the attachment has been deleted, click **Upload** to attach your *Personal Service Contract Template* you modified in step 36.

NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.

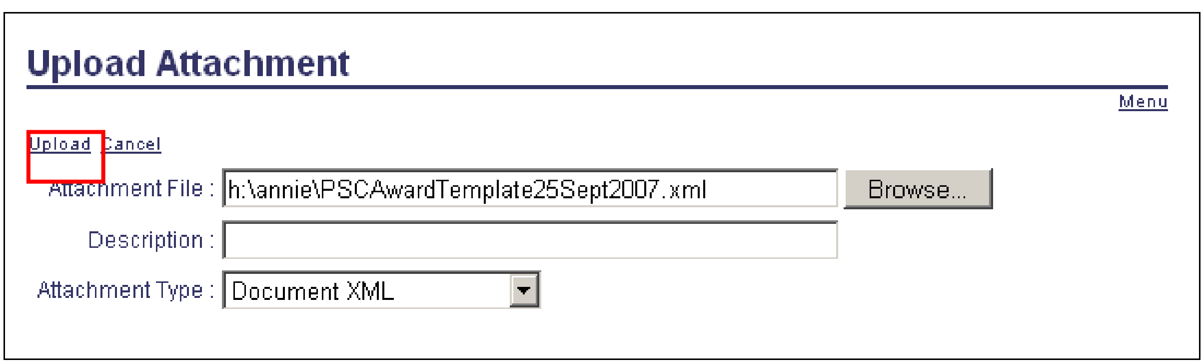


40. **Browse** your local hard drive for the PON2 Awards template that has been saved as an **.XML** document.

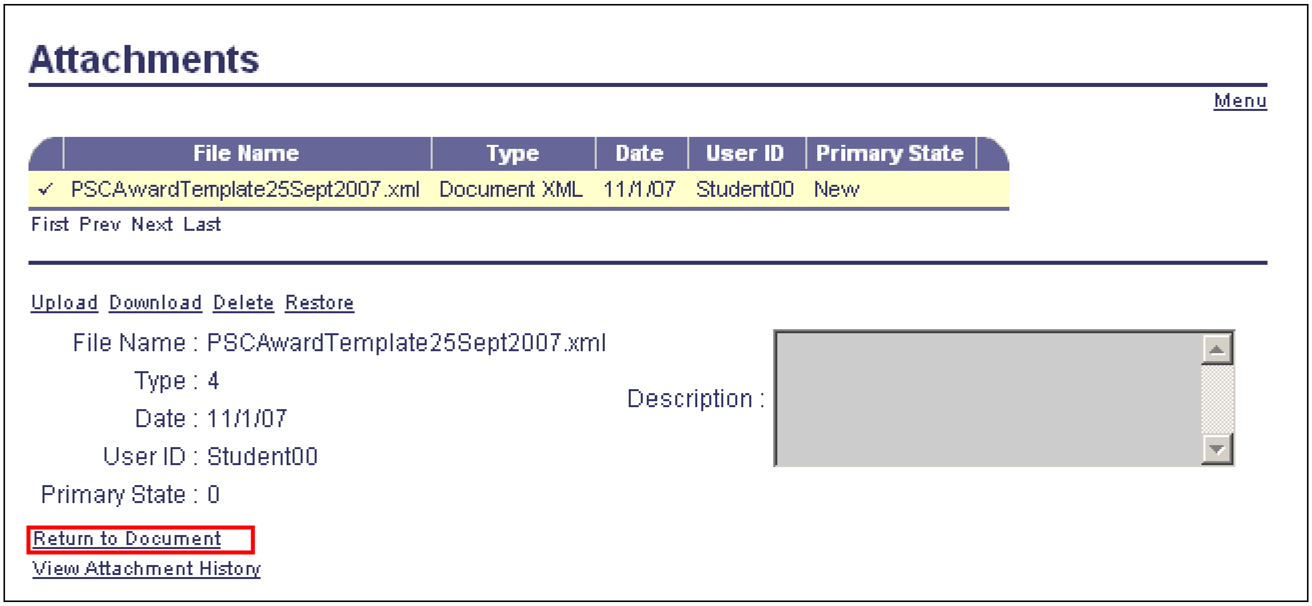
NOTE: Make sure that the Attachment Type of Document XML is selected

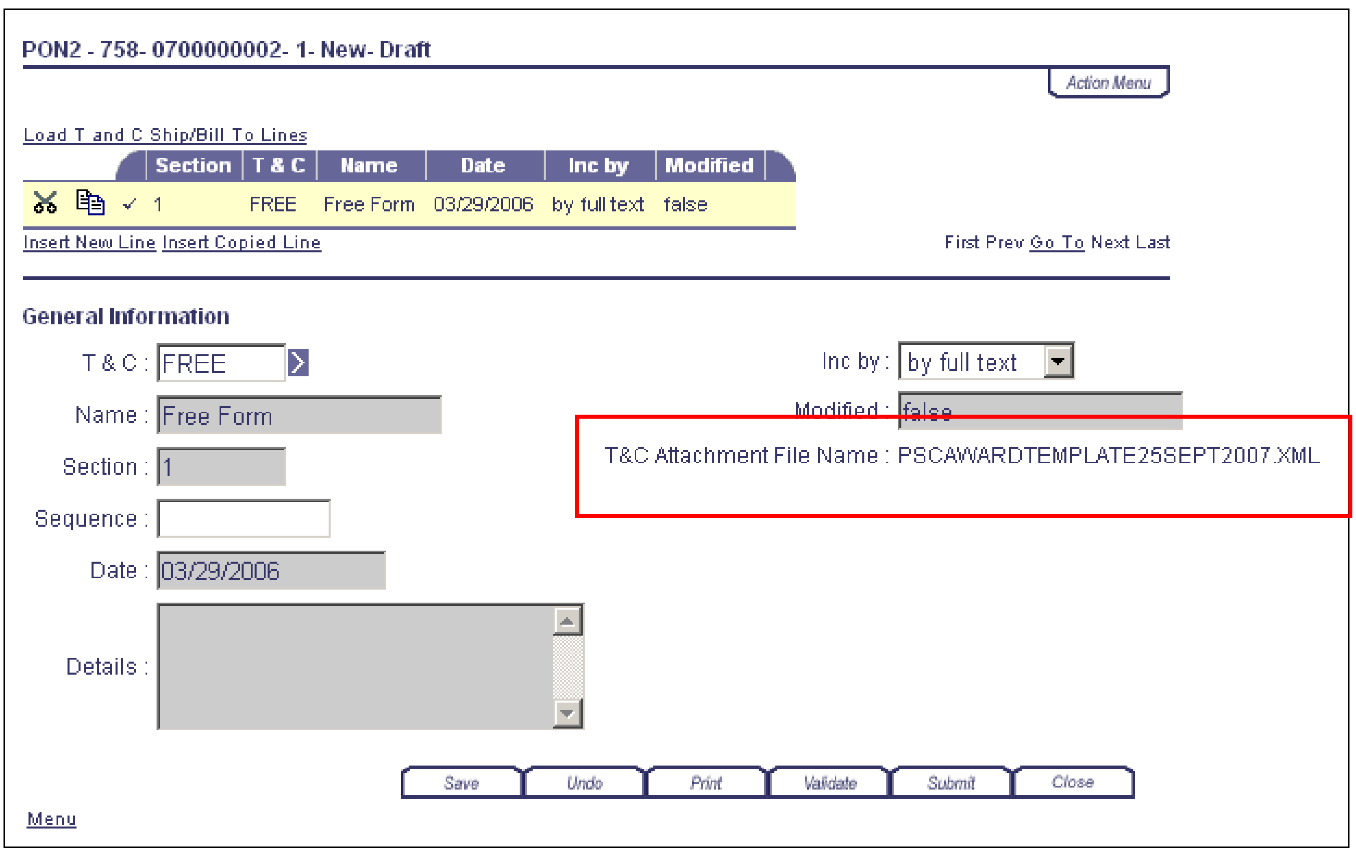


41. Once you have located and selected the correct file, click **Upload**.



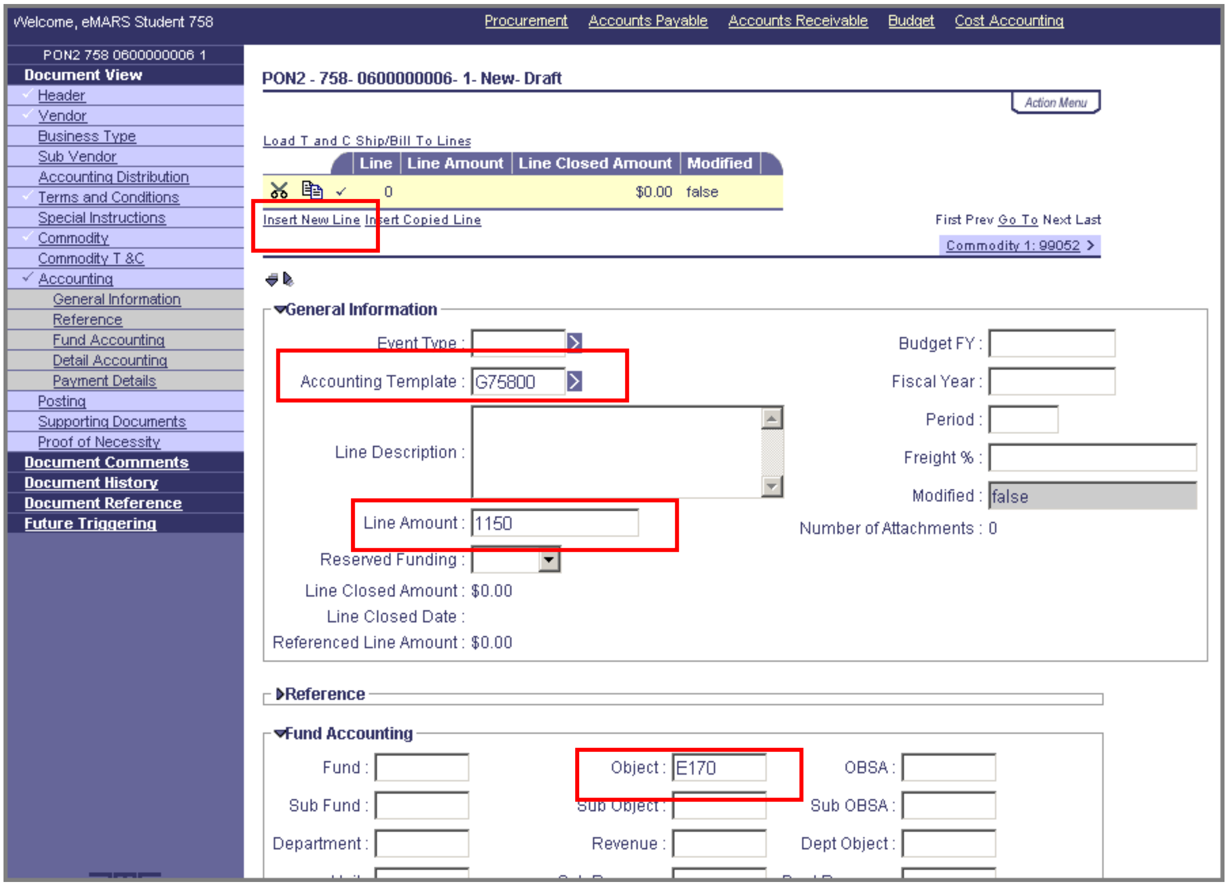
42. Once the upload has completed successfully, click on the **Return to Document** link to be transitioned back to the Terms and Conditions section of the PON2. Once there you will notice that the T & C Attachment File name has changed to your new file.





43. Click on **Commodity** in the Secondary Navigation Panel and note the Commodity information defaulted from the **RFP** document. (This information should not be changes due to the Competitive Bidding Processes.)

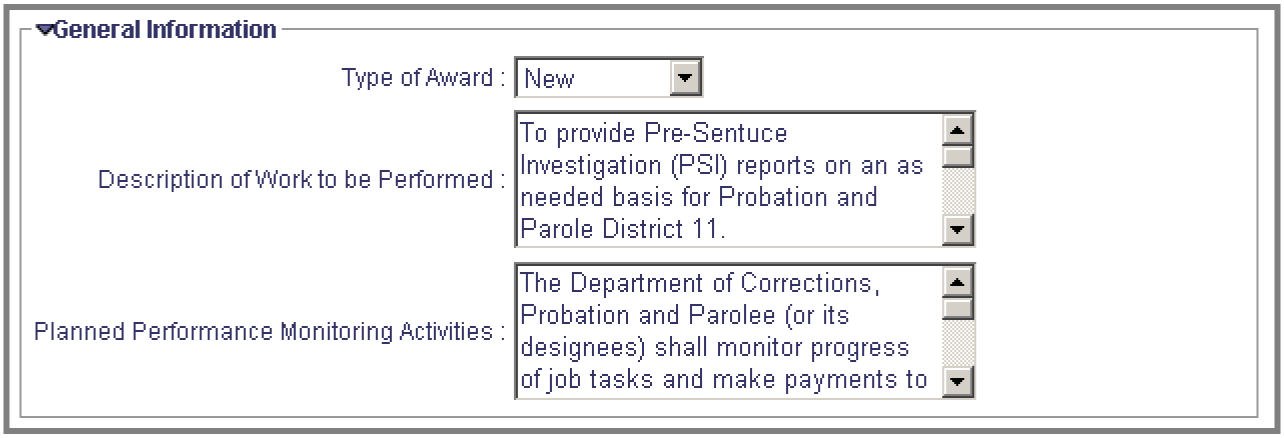
44. Click on **Accounting** in the Secondary Navigation Panel to enter Accounting string information.



45. Click **Insert New Line** and enter the following required information:

Required Fields	Values
Accounting Template	Enter the **Accounting Template from your Student Card**.
Line Amount	Enter the contract amount. Enter **1150**.
Object	Enter **E170.**

46. Complete the **Proof of Necessity** component. Click **<u>Proof of Necessity</u>** from the Secondary Navigation Panel. The page opens to the **General Information** section.

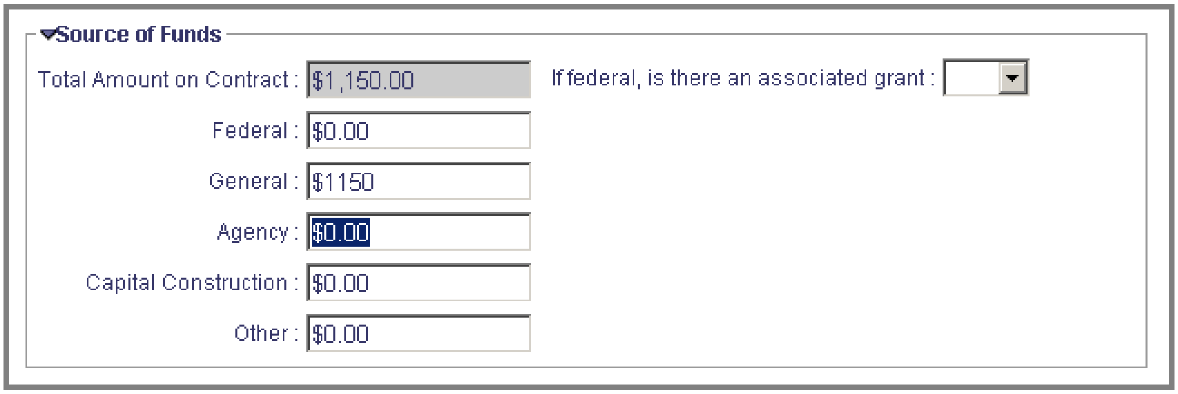


47. In the **General Information** section, enter the following required fields:

Note: You are not required to enter in <u>all</u> the information noted in the field below.

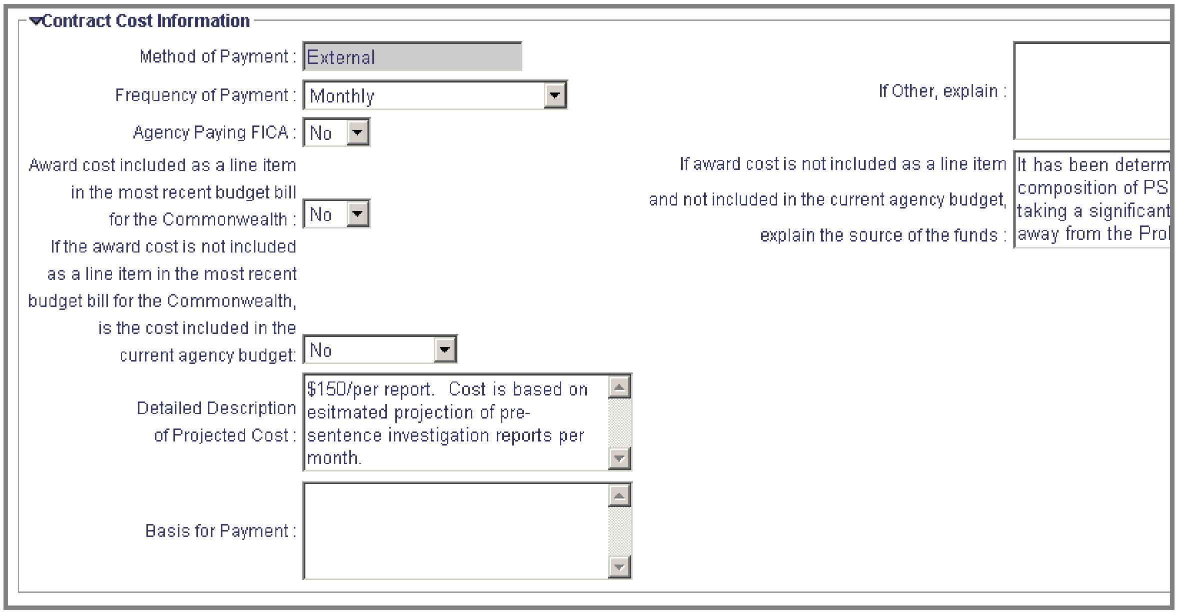
Required Fields	Values
Type of Award	Select "**New**"
Description of Work to be Performed	Enter **"To provide Pre-Sentence Investigation (PSI) reports on an as needed basis for Probation and Parole District 10.** **The Division of Probation and Parole are required to provide sentencing courts with timely, relevant and accurate data to aid the court in determining appropriate sentences for felony offenders. Pre-sentence investigation (PSI) reports are written court ordered reports after a felony offender's adjudication of guilt. It is a record of information reflecting the felony offender's background to assist the court and other criminal justice agencies in determining an effective program for the offender including an analysis of the history of delinquency or criminality, physical and mental condition, family situation and background, economic status, education, occupation, personal habits and any other matters that the court directs to be included.".**
Planned Performance Monitoring Activities	Enter **"The Department of Corrections, Probation and Parole (or its designees) shall monitor progress of job tasks and make payments to the vendor in accordance with the terms detailed in the contract clauses. Upon completion, pre-sentence investigation reports shall be maintained solely in the custody of the Department of Corrections, Division of Probation and Parole. Vendor shall be required to maintain confidentiality of report contents in compliance with KRS 439.510 and KRS 532.050."**

48. Open the **Source of Funds** section and enter the following required fields:



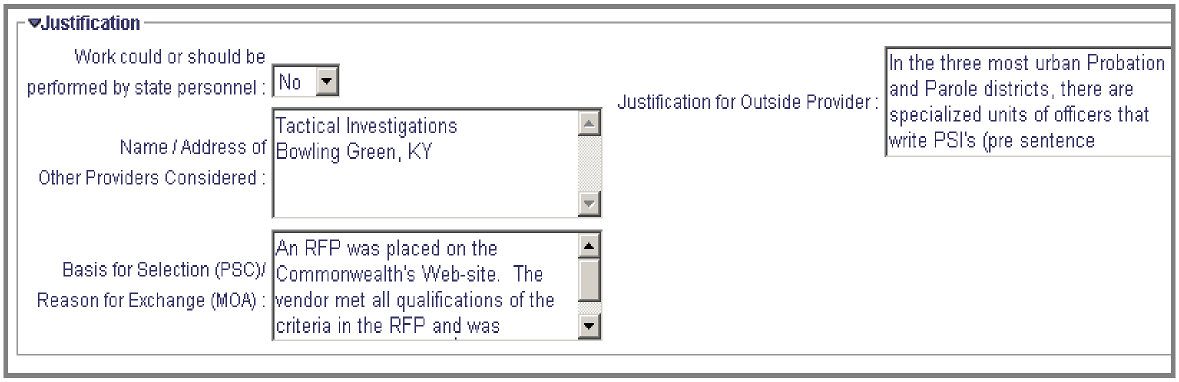
Required Fields	Values
General	Enter **1150**

49. Open the **Contract Cost Information** and enter the following required fields:



Required Fields	Values
Frequency of Payment	Select **Monthly**.
Agency Paying FICA	Select **No**.
Agency cost included as a line item in the most recent budget bill for the Commonwealth	Select **No**.
If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds	Enter **"It has been determined that the composition of PSI reports was taking a significant amount of time away from the Probation and Parole officers. This contract will free up valuable time. Funding shall be generated by the economies of scale this contract will create. In as much as this contract represents less than one-tenth of one percent of the total Probation and Parole budget, the agency can absorb any added cost this contract shall precipitate."** **<u>NOTE: You are not required in this exercise to enter in all the information above.</u>**
Detailed Description of Projected Cost	Enter **"$150/per report. Cost is based on estimated projection of pre-sentence investigation reports per month."**

50. Open the **Justification** section and enter the following required fields.



Note: You are not required to enter in <u>all</u> the information noted in the field below.

Required Fields	Values
Work could or should be performed by state personnel	Select **No**.
Name / Address of Other Providers Considered	Enter "**Tactical Investigations, Bowling Green, KY**".
Basis for Selection (PSC)/Reason for exchange (MOA)	Enter **"An RFP was placed on the Commonwealth's Web-site. The vendor met all qualifications of the criteria in the RFP and was awarded the contract."**
Justification for Outside Provider	Enter **"In the three most urban Probation and Parole districts, there are specialized units of officers that write PSI's (pre sentence investigation) exclusively. In an effort to benefit from this practice in the rural districts, the Department of Corrections will enter into personal service contracts with individuals to write PSI's, thus freeing the officers to focus on critical offender issues and expand the workforce without adding additional full-time personnel. The Department of Corrections will be better able to fulfill its mission and obligations to the citizens of the Commonwealth in protecting life and property".** **<u>NOTE: You are not required in this exercise to enter in all the information above.</u>**

51. Open the **Contact Information** and enter the following required fields.

Required Fields	Values
Name	Enter **"your name"**
Phone Number	Enter **502-564-9641**

Print the PON section of the document. The Proof of Necesity section of the PON2 document is specifically reserved for the Government Contract Review Commite and will not print out with the assembled form of the document.

52.

53. Click **Validate**. Review and correct any errors.

To Assemble:

1. From the Header Section click on **Assemble Document.**
2. Click **Submit Assemble Request.**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document.

To Print the Assembled Form:

1 Return to **Header.**
2 From the **Action Menu**, select **Attachments**.
3 Click **Download**.
4 While the **PDF** document is open use the File Menu Options to either print or email the document.

54. **Submit** the document to initiate workflow for approval.

NOTE: In production, the **PON2** will be submitted to initiate workflow for approval.

NOTE: Before closing the **PON2** document, write down the Document ID on your Student Card. You will need it for the next exercise.

55. Once the **PON2** Award has been submitted to final, click **Close** to return to the **EV** document.

56. Click **Submit** to complete the **EV** document. This action will trigger the upload of award information to Vendor Self-Service (**VSS**).

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7 – Proof of Necessity Agreement Document

PON2 documents will be reviewed by the Finance and Administration Cabinet to ensure that the user department follows all policy, procedures and statutes that govern Personal Service Contracts. Finance will also review the **PON2** to ensure that the proper **Procurement Type**, **Cited Authority** and **Terms and Conditions** are used.

NOTE: The **PON2** should be used for all Personal Service Contracts and Memorandum of Agreement.

PON2 document may be created in one of two ways:

a) From the **EV** document as a result of a Competitive Negotiation process, and

b) For Sole Source scenarios the **PON2** may be created from your **Procurement Workspace**.

PON2 Document

Access the **Procurement Workspace.**

Click **Create Stand Alone Document**, select **Create Stand Alone Awards**, and click **Personal Service Contract** (**PON2**).

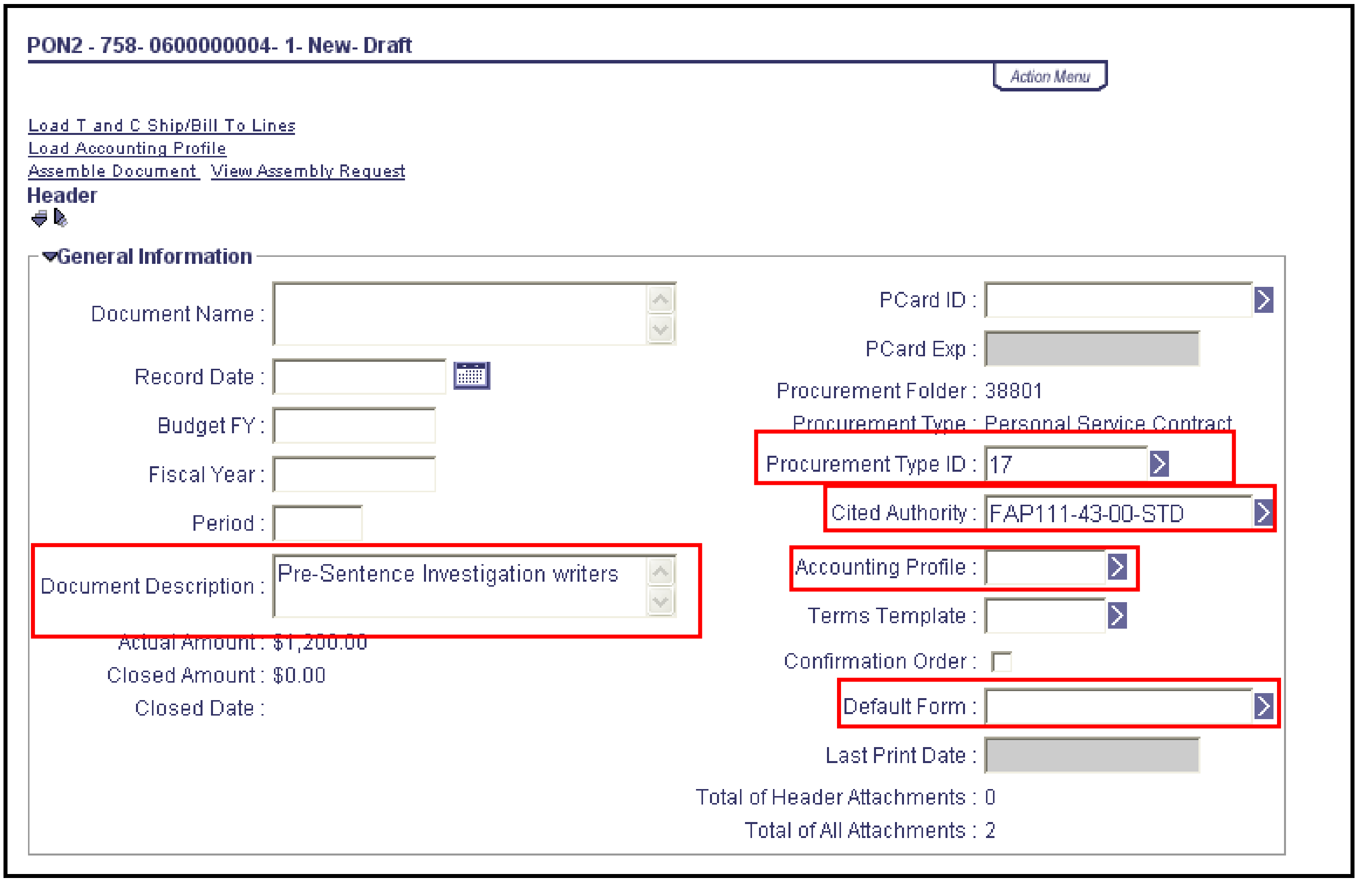
Click **Create** to change into Create mode.

Enter your document **Department Code** and **Unit Code** from your Student Card.

Click **Auto Numbering.**

Click **Create** to create the **PON2** document. The document opens to the **Header** page.

Complete the required and optional information in the Header section.



- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- You may select an **Accounting Profile** here to populate the **Accounting Distribution** section. Once you have selected an **Accounting Profile,** click on the **Load Accounting Profile** link to populate the Accounting Distribution section with the Accounting lines associated with the profile.
- Select a **Procurement Type ID** that corresponds to the business process being followed.

NOTE: It is important to select the **Procurement Type** prior to selecting the **Cited Authority**, in order to filter the choices to only those that are compatible.

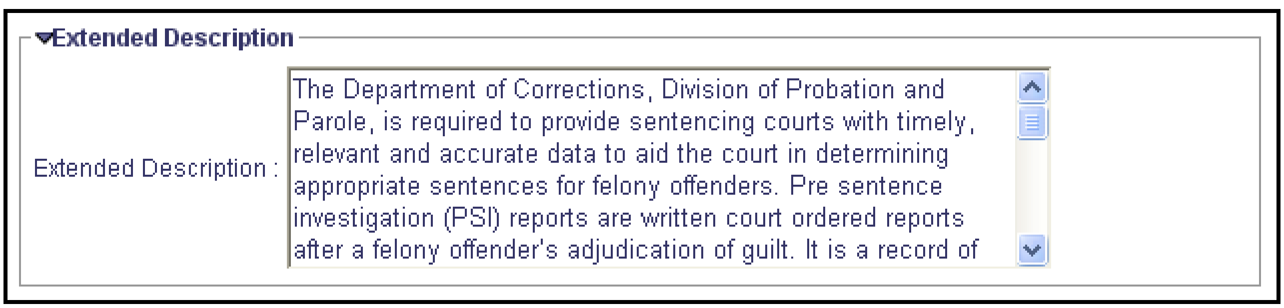
- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.
- The **Default Form** field is used to select the out-put form to be used in the document assembly and printing process.

NOTE: Do not enter a **Budget FY**, **Fiscal Year**, or **Period**. They will be automatically infer when the document is submitted to final.

Complete the **Contact** section:

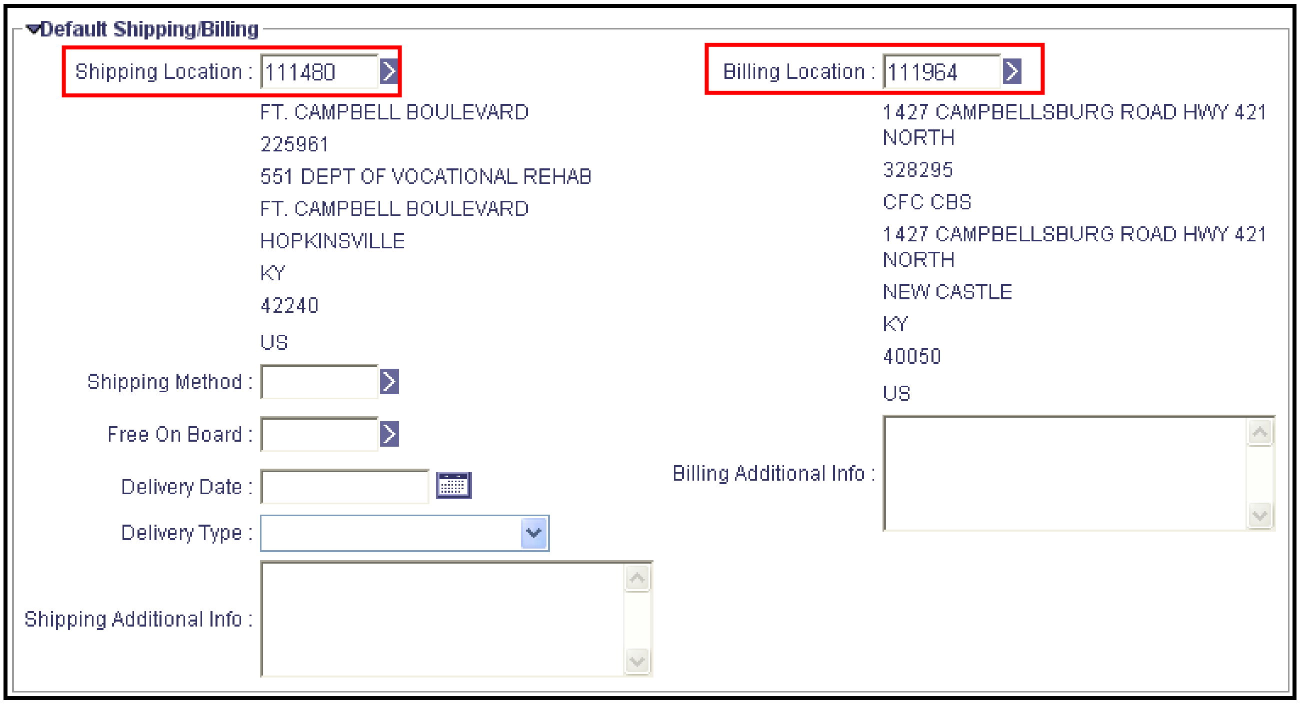
- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- Complete the **Requestor ID** field that is used to identify for whom the goods or services are being requested, (e.g. who will actually be using the items or services detailed on this Requisition). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Extended Description** Field (optional).



- The **Extended Description** field can be used to further describe the nature of the requirements being requested. This field can store up to 1500 characters of text. This field does not print.

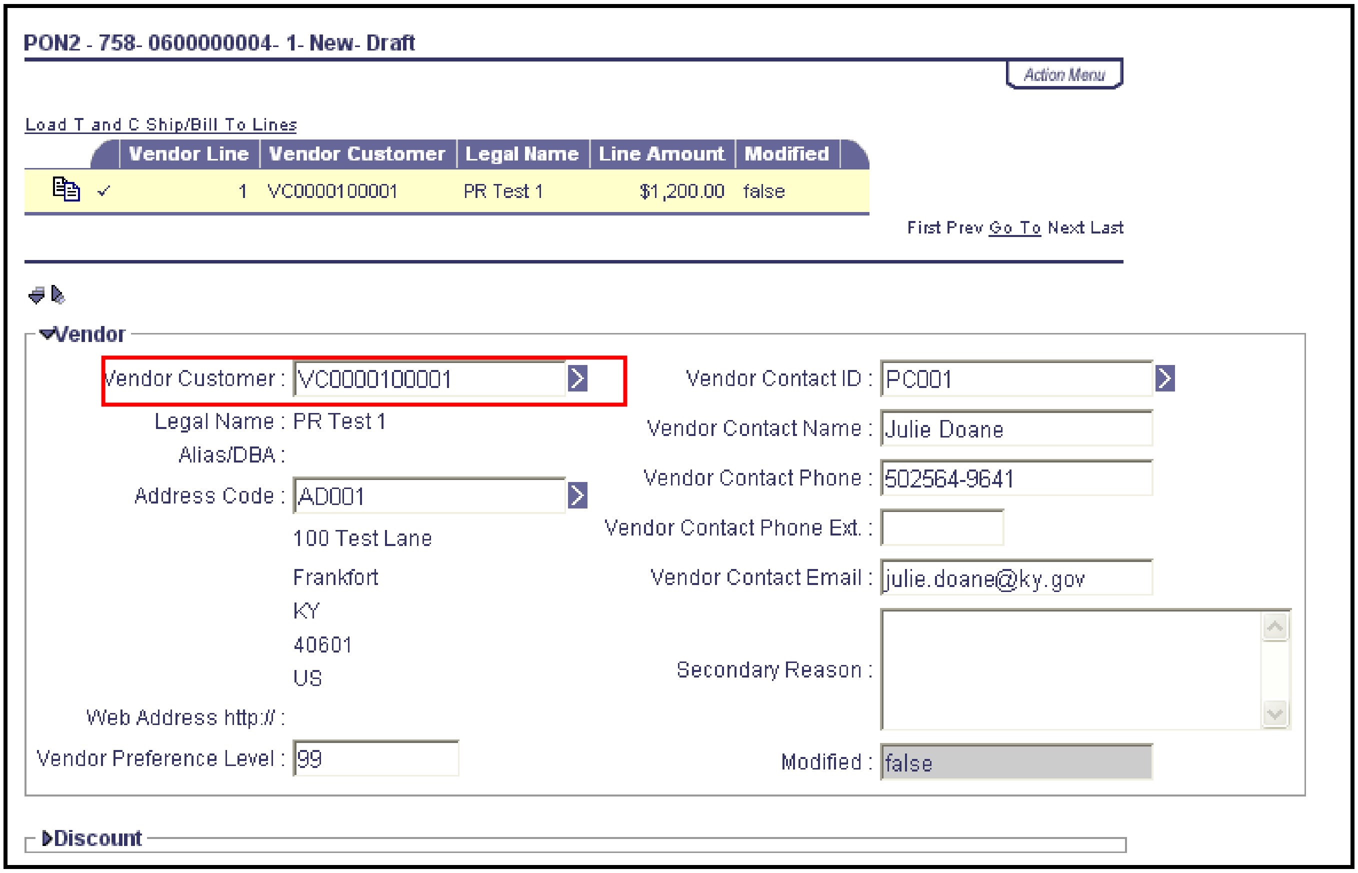
Complete the **Default Shipping/Billing** section. If the same Shipping and Billing information should be used on each line of the Purchase Order you can complete this section. When you are creating Commodity line items you may click on the **Ship/Bill To Lines** to have this information automatically populated on the line item. (Optional) Shipping Information is not required on the **PON2** document.



- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** reference table.
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** reference table.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE: Do not complete the **Shipping Method**, **Free on Board, Shipping additional information, Billing Additional Information** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Complete the **Vendor** component.



- The **Vendor Customer** code field is used to store the eMARS Vendor Code for the Vendor being recorded. Click on the **arrow** next to the **Vendor Customer** field to open the **Vendor Customer** pick list. On the pick-list page you may search for a Vendor by Legal Name, Last Name, Alias, and/or Vendor Active Status.

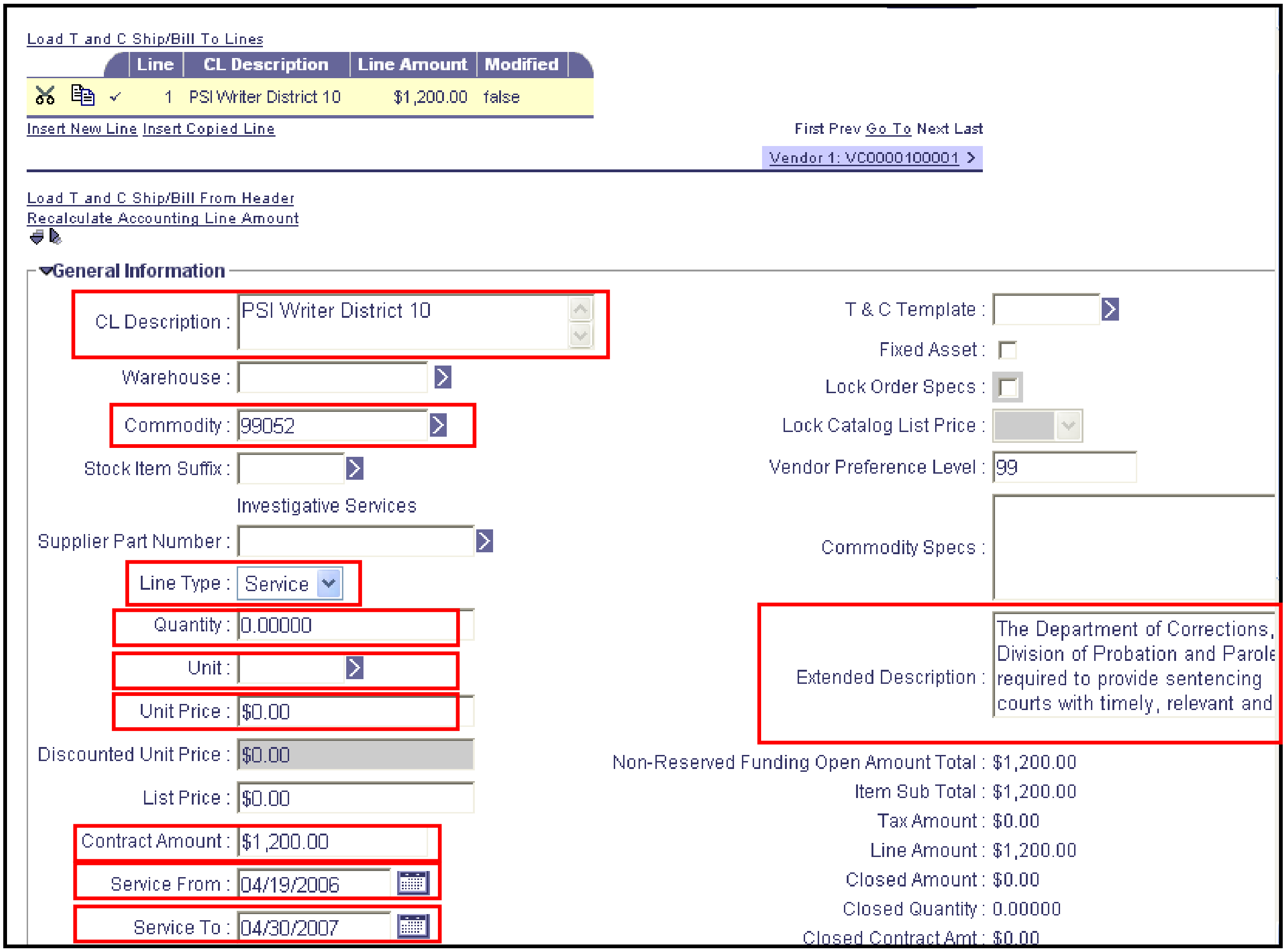
NOTE: If you know part of the Vendor Code field you may type it into the **Vendor Customer** field using wildcards. When you click on the **arrow**, the Vendor pick-list will be filtered by the value you have entered.

NOTE: The **Vendor Address** and **Contact Information** will default to this document when it is validated.

NOTE: If this document was generated from an Evaluation (EV) document then the Vendor Component will be pre-populated.

Build **Commodity** Lines. The **Commodity** section of the Contract is used to list all distinct goods or services being requested.

Complete the required fields for the Commodity **General Information** section.



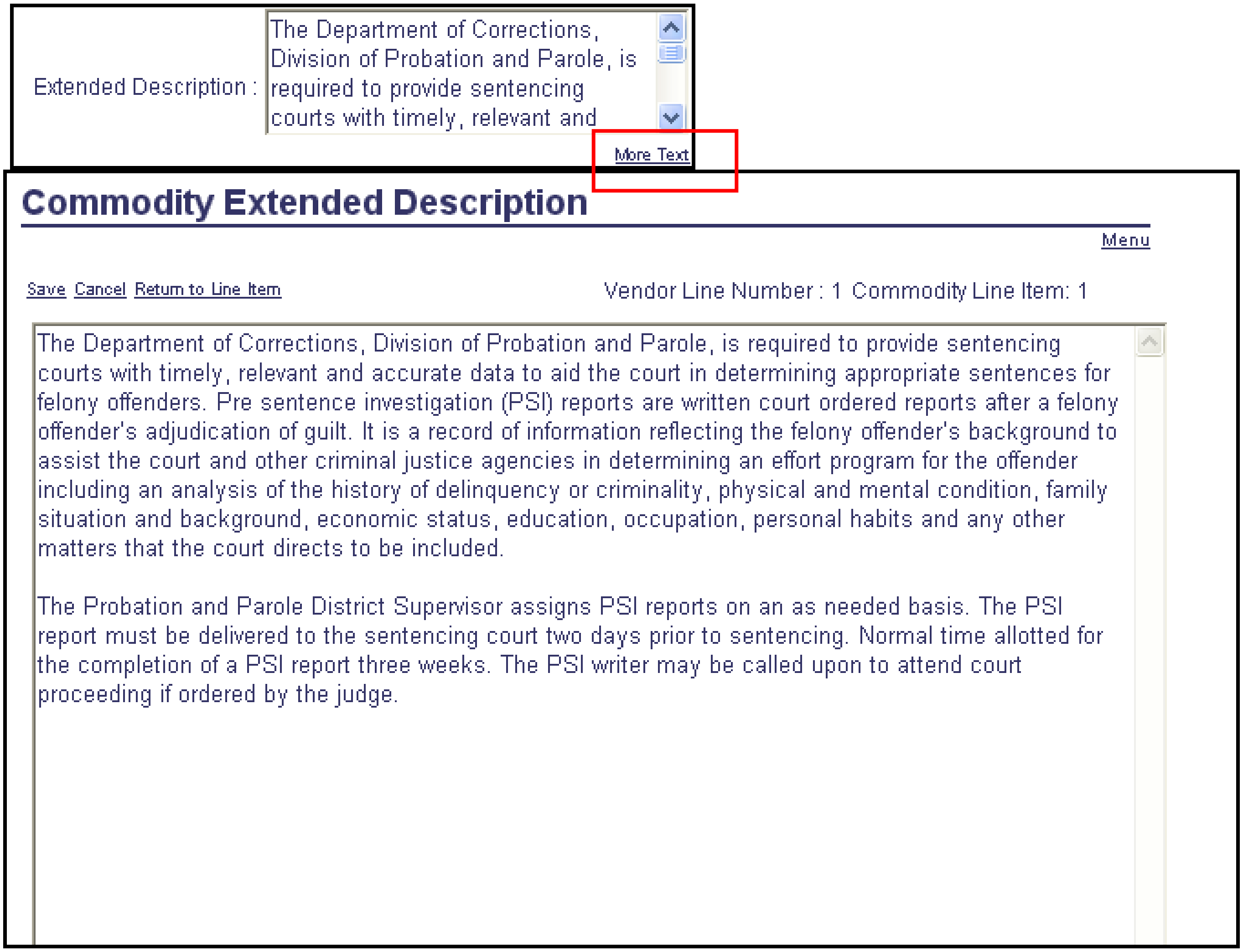
- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the Commodity section in order to help you identify which line you would like to inspect or modify.
- The **Commodity** field is used to store the five digit NIGP Commodity code that closest matches the item or service being purchased. This field is used primarily for classification purposes.

NOTE: It is important to make the first commodity the one that is most relevant to the Contract as a whole. The first commodity code is used by EMARS to determine which office will receive the **PON2** for processing.

- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and services should be entered as **Contract Amount**. When the Vendor for the **PON2** is a state employee and salary payments are issued to them from **UPPS**, a **Line Type** of **Service** should be selected. This will ensure that only a lump-sum dollar value may be entered.
  - When you know the **Unit Price** a **Line Type** of "**Item**" should be selected. The **Unit** of Measure, **Unit Price**, and **Quantity** are required.
  - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a Line Type of "**Service**" should be selected. When the Line Type is service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the **More Text** link.

NOTE: When a **PON2** document is created through the **EV** document the Extended Description will contain the same information that was entered into the **RFP** document. The text that defaulted when the **PON2** is created *must* be modified to reflect the **PON2** document.

NOTE: To insert a **TAB** into the **Extended Description** field the user must type [**Ctrl**]+[**Tab**].



- **Accounting Profile (Optional)** field can be used to select an Accounting profile. When the Accounting Profile field is populated on the **Header** and document is validated, the Accounting section associated with the Commodity line is automatically populated with the Accounting Templates and related percentages associated with the Accounting Profile.

Complete the **Shipping**/ **Billing** information section.

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** reference table. The **Shipping Location** code is not required on the **PON2** document.
- **The Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** reference table.

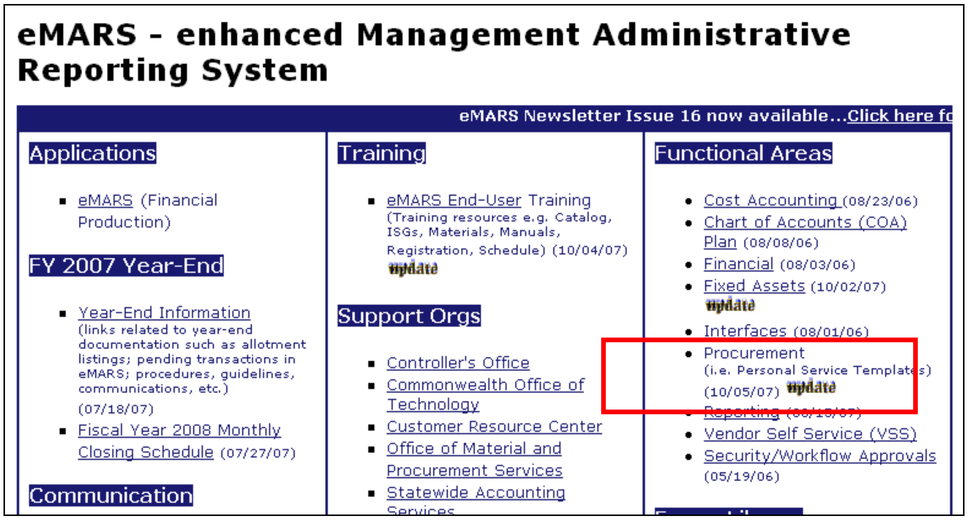
Complete the **Specifications** section (Optional). This section may be used to record additional information that you feel should be stored separately from the Commodity Line extended description.

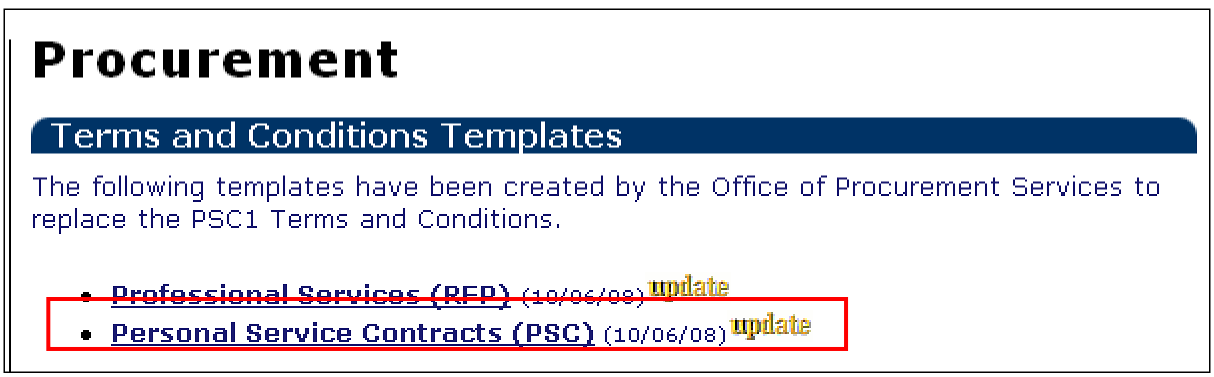
Complete the **Terms and Conditions** component. Terms and Conditions are created by attaching a Word Document, saved as **.XML** to the Terms and Conditions section of the Proof of Necessity document. The Office of Procurement Services (**OPS**) has developed a Terms and Conditions template for all Personal Service Contract documents. This template is located on the eMARS and the Office of Procurement Services websites. The template contains the required information that must be incorporated in the Terms and Conditions section and allows for users to make changes to areas of the template to be agency specific.

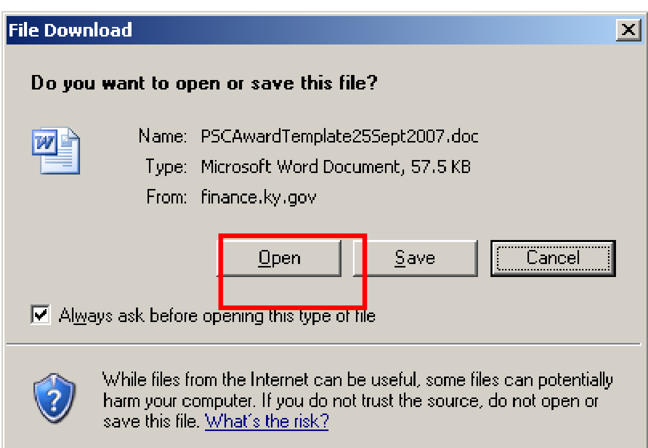
Users will need to download a copy of the Personal Service Contract Award template from the website and modify **only** the highlighted portions of the template to make it specific to the agency. Once the changes have been made to the template the document will need to be saved as **.XML** and uploaded as a **Free Form** Attachment to the Terms and Conditions section of the document.

Please follow these steps to add your **Terms and Conditions**

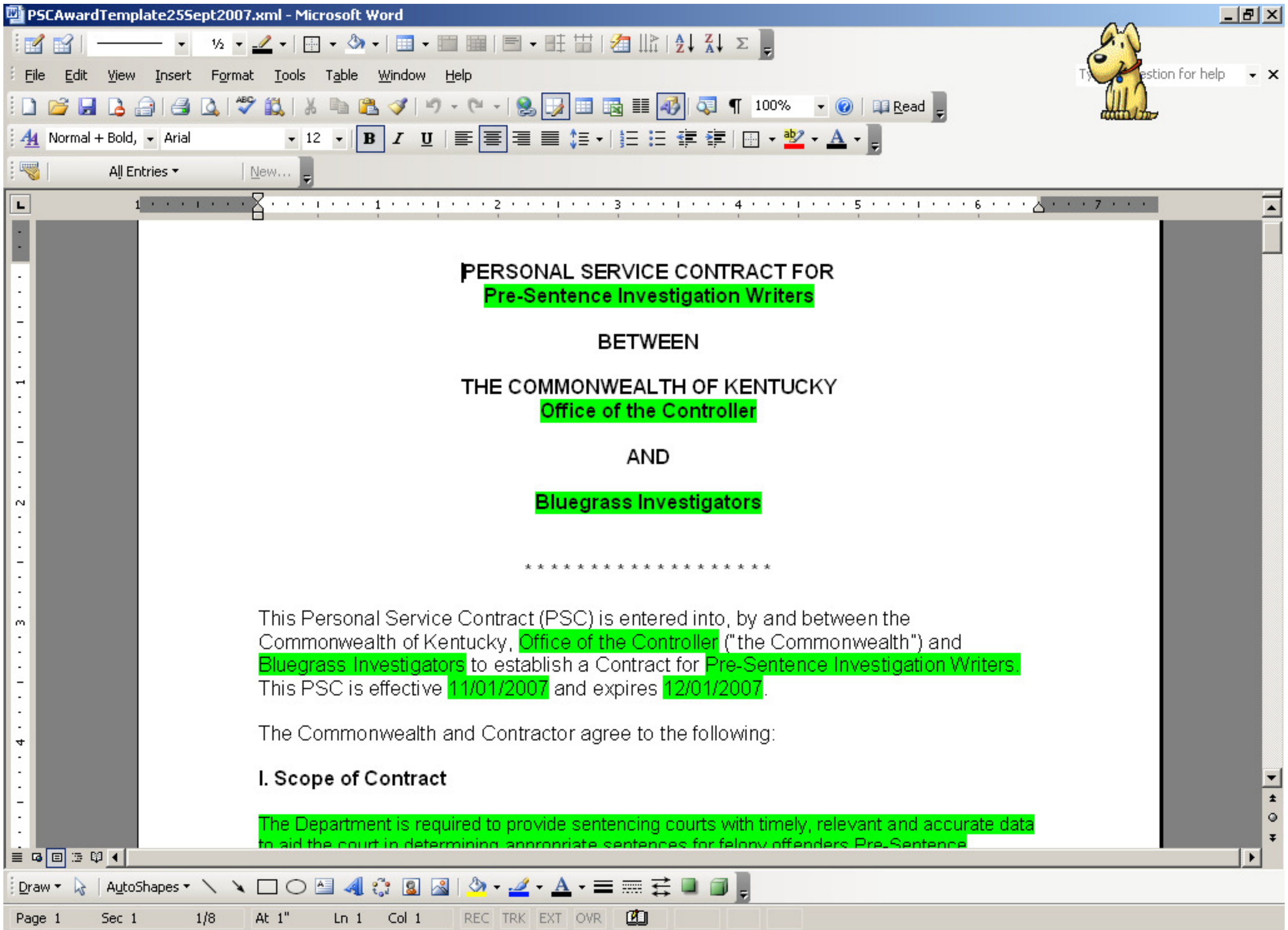
a. Navigate to the *Procurement Functional* area of the eMARS website and ***Open*** a copy of the desired template that will need to be modified to your desktop.



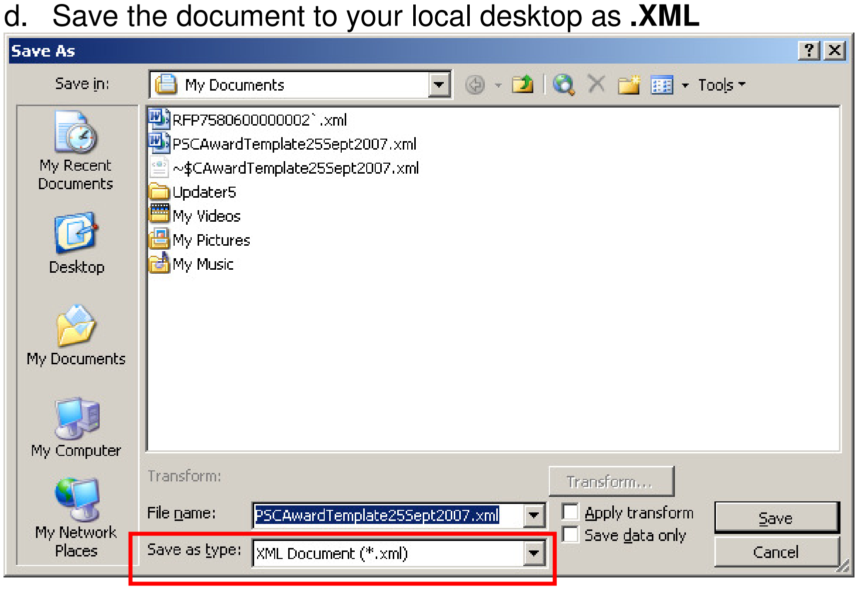




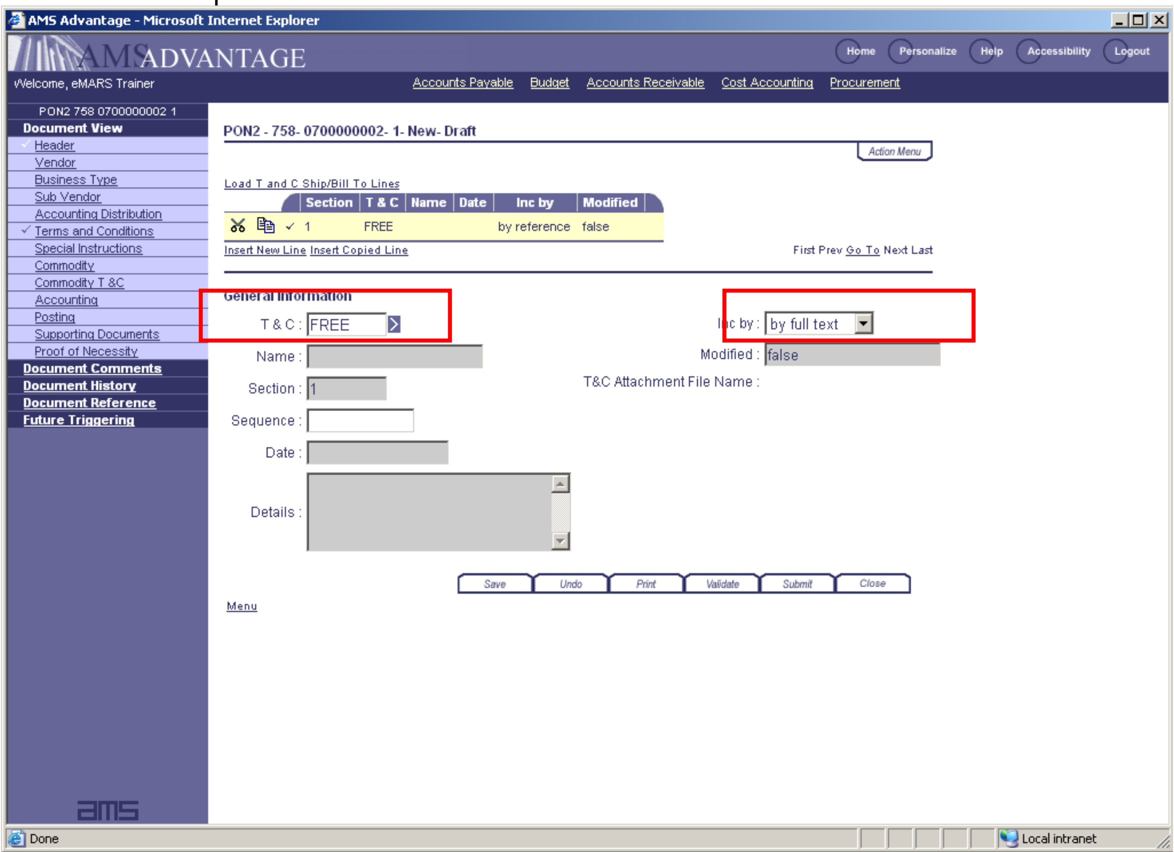
b. Modify <u>only</u> the highlighted sections of the document to make it specific to the agency and the Personal Service Contract.



c. Remove all highlighting from the template
d. Save the document to your local desktop as **.XML**



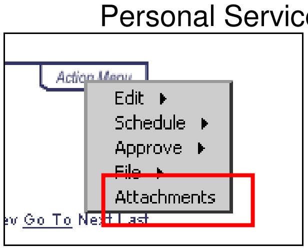
e. Navigate to the **Terms and Conditions** section of the **PON2** and click **Insert New Line**. When the record has been added, click on the **arrow** next to the T & C field and select **Free Form** from the picklist.



f. Using the drop down menu change the Inc by: to **Full Text.**

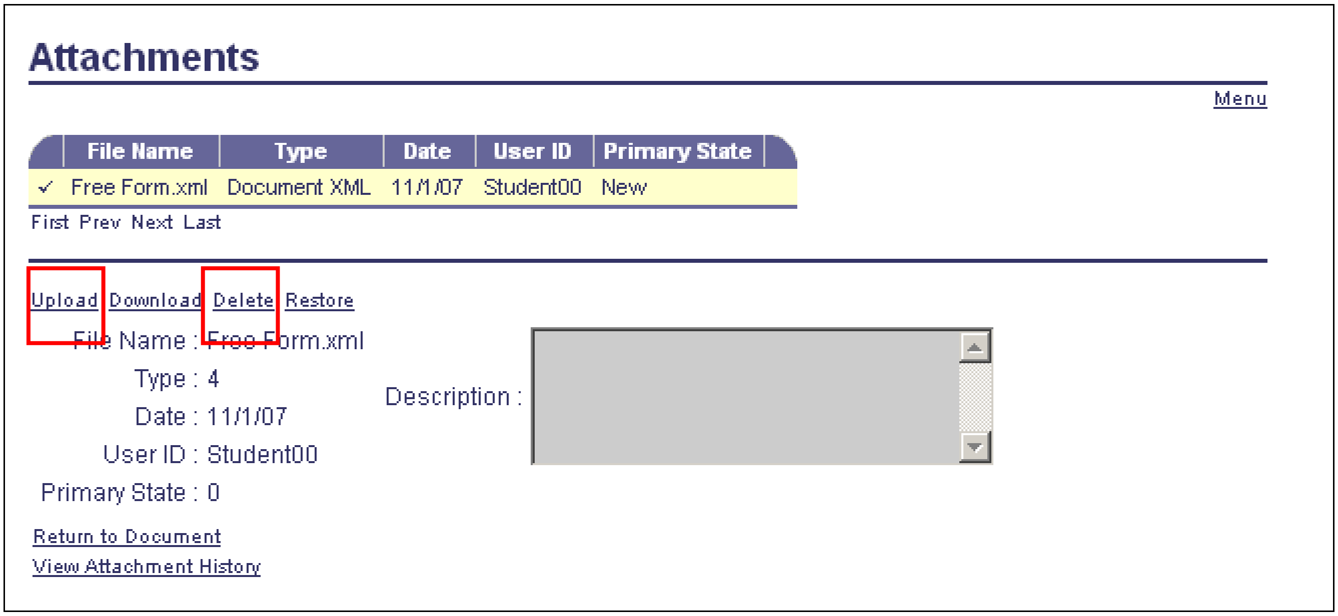
NOTE: By selecting the Free Form Terms and Conditions, the system allows you to attach your own **.XML** document to your **Proof of Necessity** document rather than a system standard. When the Free Form template is used a blank document will be incorporated into the Attachments section of the PON2 Terms and Conditions.

g. Click the **Attachments** link from the **Action Menu**. This will allow you to attach the copy of the Personal Service Contract Award Template that you created.

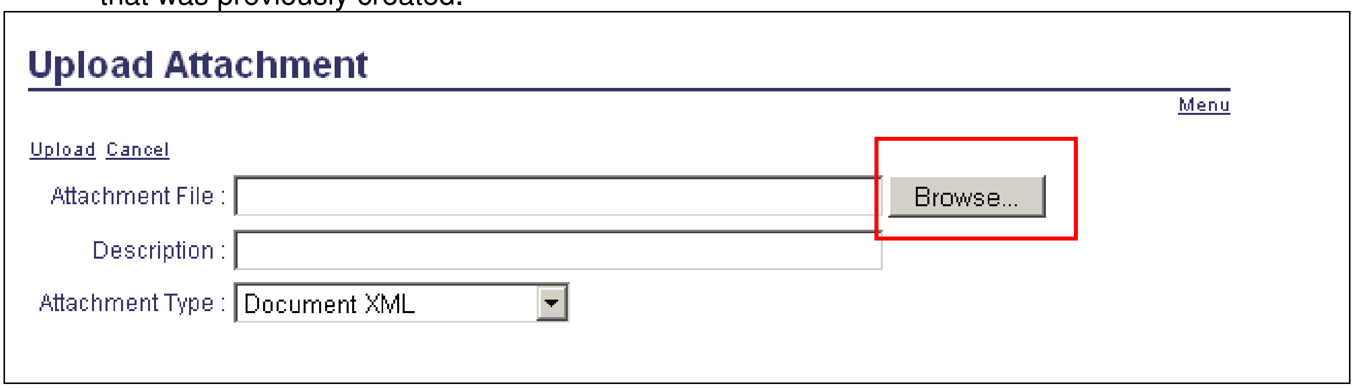


h. The **Attachment** page opens. Click **Delete** to discard the blank document brought in when the Free Form Terms and Conditions was selected from the T & C picklist. Once the Free Form attachment has been deleted click **Upload** to attach your template.

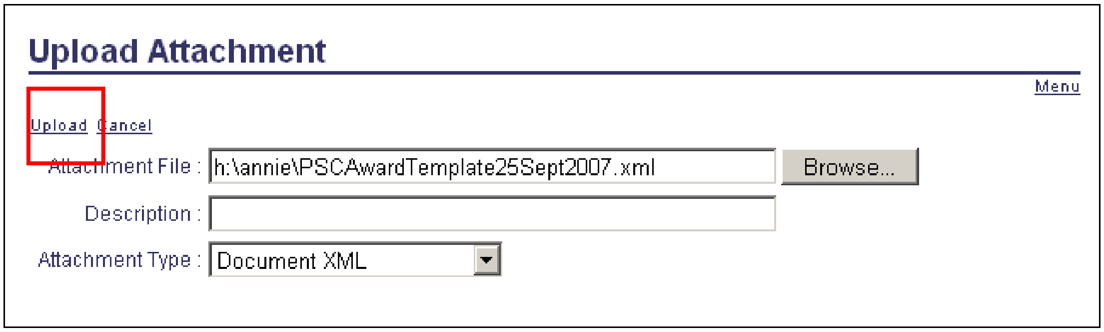
NOTE: It is important that you delete the default attachment that is automatically brought in when the Free Form T & C is selected. If the default is not deleted it may cause problems during the assembly process.



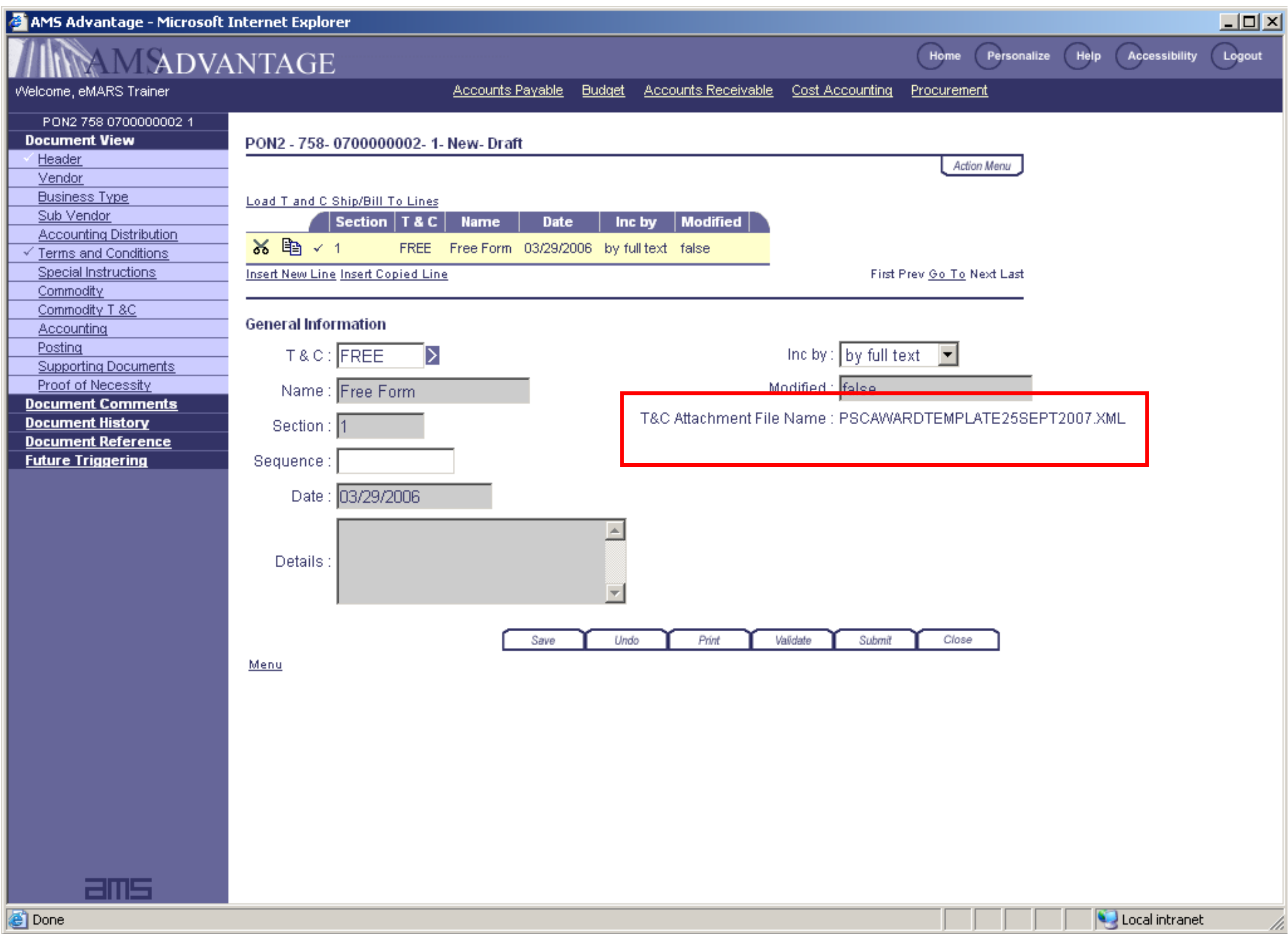
i. Once on the **Upload** page click **<u>Browse</u>** to search your local hard drive for your Award template that was previously created.



j. Once you have located and selected the file, click **<u>Upload</u>** to incorporate the document into your **PON2**.



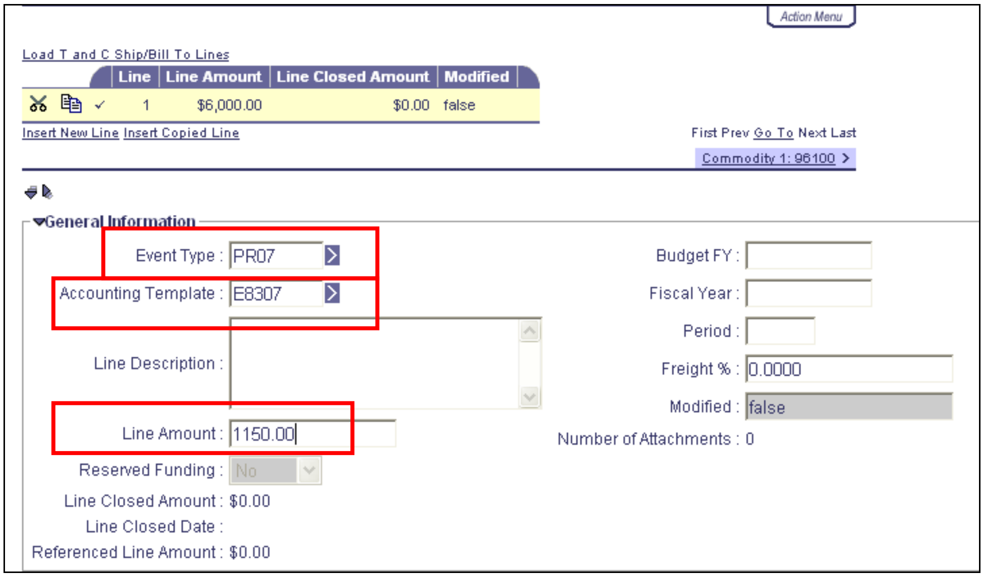
k. Once the upload has completed successfully, click **Return to Document** to be transitioned back to the **Terms and Conditions** section of the **PON2**. Once there you will notice that the *T & C Attachment File Name* has changed to your new file. eMARS will not use this file for the final version of the contract.



Complete the Accounting Section

The Accounting Section Panel will need to be manually completed if a template or profile is incomplete or has not been used. The Panel displays all Accounting lines referencing the parent Commodity line. Each Commodity line will require an Accounting line.

Complete the required fields for the Accounting General Information section:



The **Event Type** is used to determine what posting codes will be used while bringing in specific rules fro data entry concerning referenced transactions, customer codes, vendor codes and all defined chart of account elements in the system. The **DO** document uses the following Event Types:

Encumbering Event Types:

- **PR05-** Order from External Vendor (default)
- **PR06-** Order from Internal vendor

Non-Encumbering Event Types:

- **PR07-** Non-Accounting Order

Select the **Accounting Template** by selecting the pick list nest to the field. Accounting Templates are used to populate the Fund and Detail Accounting elements in the document. Elements of the Accounting Template are inferred after the document is validated. Any values entered by the end user either before or after the template has been inferred will override any values from the template.

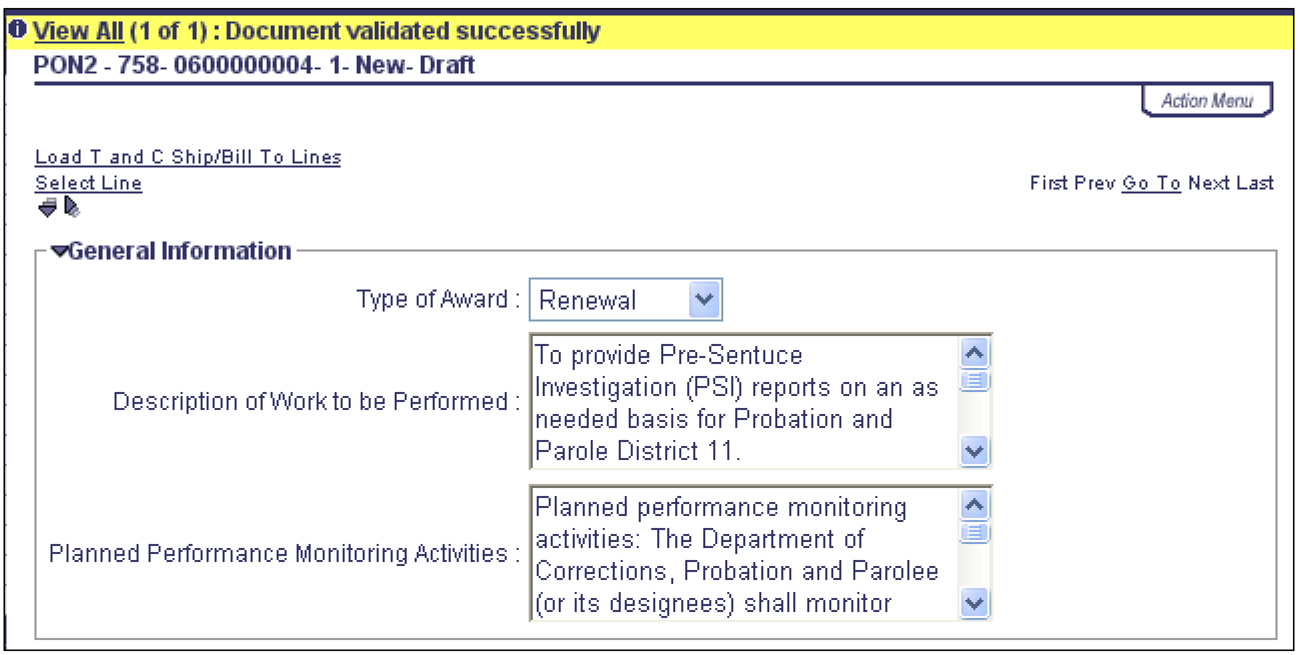
Indicate the **Sub Total Line Amount**. This is the amount that is allocated to this Accounting Line. The sum of all Accounting Lines must equal the referenced Commodity Line.

View the Fund and Detail Accounting elements. These elements will be inferred if an Accounitng Template is used or may be added by the user.

Complete the **Proof of Necessity Component (PON)**. Owned by the Legislative Review Committee (**LRC**) and required on all Personal Service Contracts pursuant to **KRS 45A.695(2)**. The **PON** component is designed to capture information necessary for **LRC** to produce their monthly agenda. The **PON** tab contains fields that require certain information as outlined below: If the document does not meet all of the above requirements, an electronic "sticky note" is applied to the contract with an explanation and is routed back to the requesting agency. Agency will review and make correction/s and return to Finance for further processing. If the document passes all of the requirements above, the Personal Service Contract office applies an electronic approval (Finance Validate) and routes the document to Finance/Legal.

- The need for the service;
- The unavailability of state personnel or the non-feasibility of utilizing state personnel to perform the service;
- The total projected cost of the contract of agreement and source of funding;
- The total projected duration of the contract;
- Payment information in detail;
- In the case of memorandum of agreement or similar device, the reason for exchanging resources or responsibility; and
- Such other information as the committee deems appropriate.

General Information Section

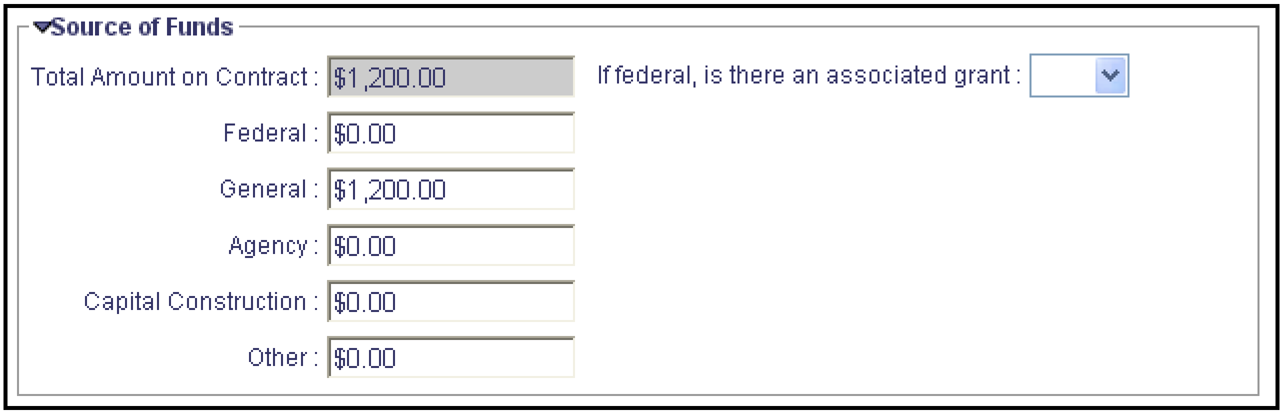


- To complete the **Type of Award** field select **New** if this if the original contract for the service. Select **Renew** if you are extending the service dates for an additional period. Select **Amendment** if you are modifying the contract within the existing service dates.

- Prepare a complete, yet concise **Description of Work to be Performed.** Please ensure correct spelling and grammar. Include: Description of project; types(s) of service to be delivered; reports or products to be prepared; reason for duration of contact; etc.).

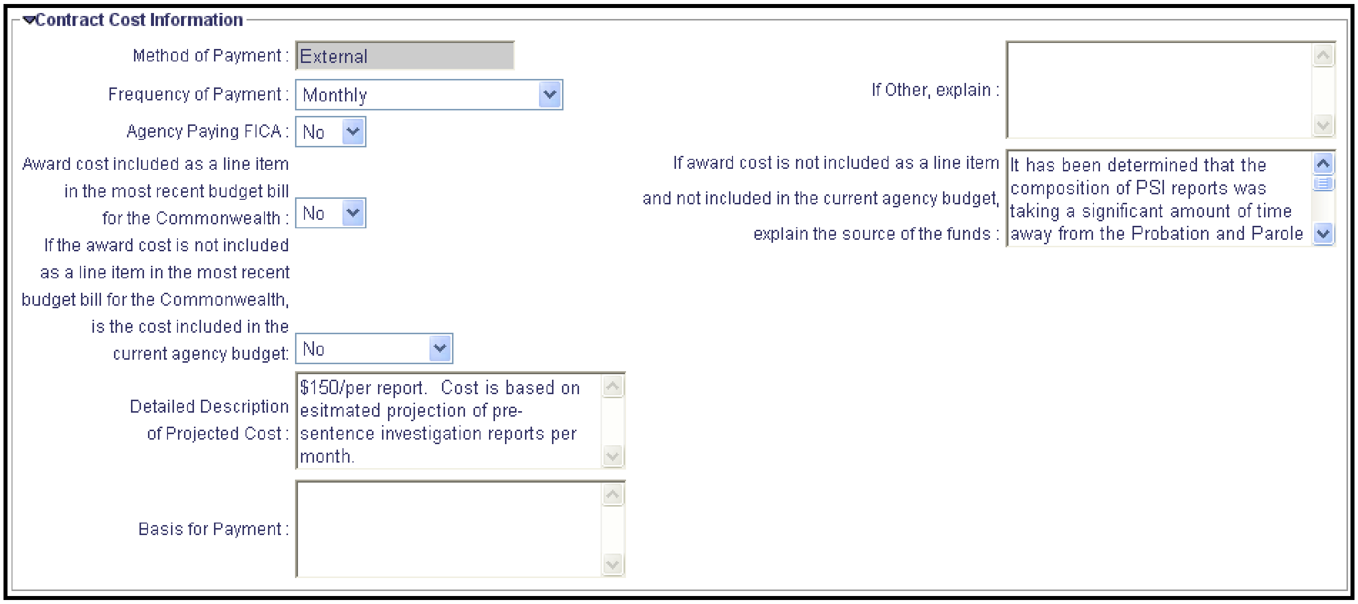
- Describe the **Planned Performance Monitoring Activities.** Provide the name, title, office, location and telephone number of the responsible person that will be monitoring the activities. Describe the monitoring activities, both programmatic and fiscal, which will be performed including the manner in which monitoring needs will be addressed in the contract to facilitate this activity.

Source of Funds section



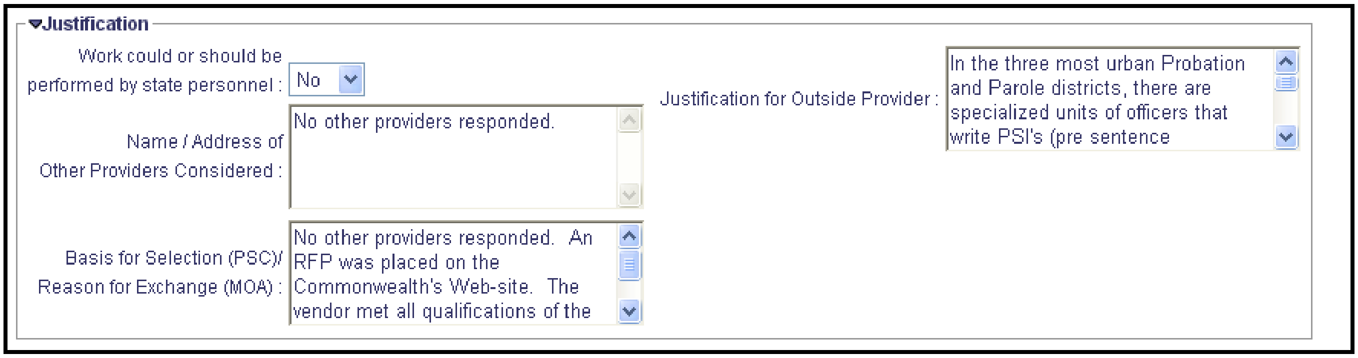
- **General**- Amount of 0100 Fund monies.
- **Federal**- Amount of 1200 Fund monies.
- **Agency**- Amount of 1300 Fund monies.
- **Capital Construction**- Amount of CPTL Fund monies
- **Other**- Amount of 1400 Fund or Proprietary Fund monies.
- **If federal, is there an associated grant.** Answer yes if paid with 1200 fund monies and is associated with a federal grant.

Contract Cost Information


Contract Cost Information
Method of Payment : External
Frequency of Payment : Monthly
Agency Paying FICA : No
Award cost included as a line item in the most recent budget bill for the Commonwealth : No
If the award cost is not included as a line item in the most recent budget bill for the Commonwealth, is the cost included in the current agency budget: No
Detailed Description of Projected Cost : $150/per report. Cost is based on esitmated projection of pre-sentence investigation reports per month.
Basis for Payment :
If Other, explain :
If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds : It has been determined that the composition of PSI reports was taking a significant amount of time away from the Probation and Parole

- For the **Frequency of Payment** select the payment frequency to which the vendor has agreed. If Other, explain provide an explanation if "Other" was selected as the Frequency of Payment
- **Award cost included as a line item in the most recent budget bill for the Commonwealth** Answer yes if this contract cost is included as a line item in the current budget bill. If answer is no, answer the agency budget question.
- **If the award cost is not included as a line item in the most recent budget bill for the Commonwealth, is the cost included in the current agency budget.** Answer yes if this contract cost is not included as a line item in the current budget bill but is included in the current agency budget. If answer is no, explain the source of funds in the space provided.
- **If award cost is not included as a line item and not included in the current agency budget, explain the source of the funds**. Explain the source of funds if this contract cost is not a line item in the current budget bill and is not included in the current agency budget.
- **Detailed Description of Projected Cost**
- **Basis of Payment**
    - Hourly: $____________________per hour,
    - Per Diem: $___________________ per day,
    - Fee for Service: $____________per service, or explain other basis for payment.

Justification



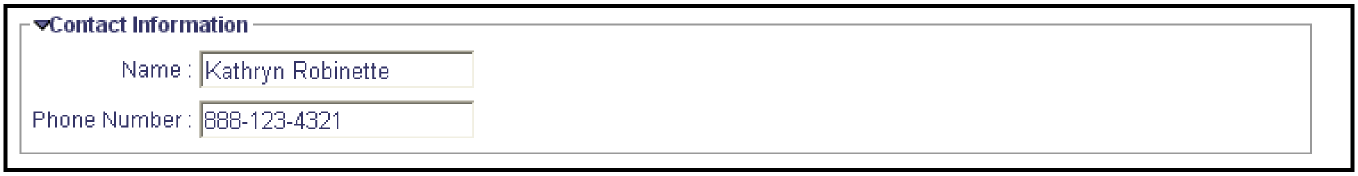
- **Work could or should be performed by state personnel.** If answer is no, Justification for Outside Provider must be supplied.

- **Name / Address of Other Providers Considered** List the name and address of all other providers that were considered for this service.

- **Basis for Selection /Reason for Change** Explain process used in making decision, e.g., solicitation of proposals, bids, references, and evaluation criteria applied.

- **Justification for Outside Provider** The following questions should be addressed at a minimum:
  - What in-house method(s) were considered and why were potential in-house method(s) rejected?
  - Is the part of such nature that: it should be done independently of the agency to avoid a conflict of interest; it requires unique or special expertise/qualifications; and/or legal or other special circumstances require use of an outside provider?
  - If services are needed on a continuing basis, describe efforts made to secure services through regular state employment channels?
  - Will agency personnel provide staff support services to the contractor?

Contact Information



- Enter the **Name** of the agency contact who can answer questions regarding the terms and conditions of this contract.

- Record the **Phone Number** of the agency contact who can answer questions regarding the terms and conditions of this contract.

NOTE: If this document was generated from an Evaluation document then the **Vendor** section will be pre-populated.

Validate your document

To Assemble:

1. From the Header Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

<u>To Print the Assembled Form</u>:

1. Return to **Header**
2. From the **<u>Action Menu</u>**, select **<u>Attachments</u>**.
3. Click **<u>Download</u>**.
4. While the **PDF** document is open use the File Menu Options to either print or email the document.

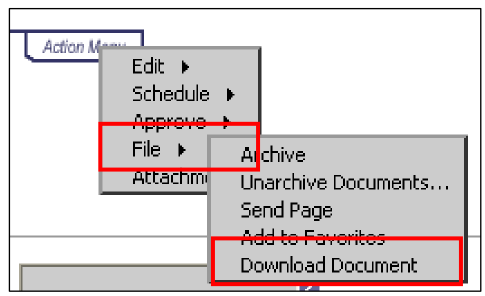
<u>Submit</u> the **PON2** to initiate workflow for approval.

Identify who should be evaluating the **PON2**. Users who will be evaluating the Personal Service Contract should be set up on the Vendor Performance Evaluation (PEEVALR) table.

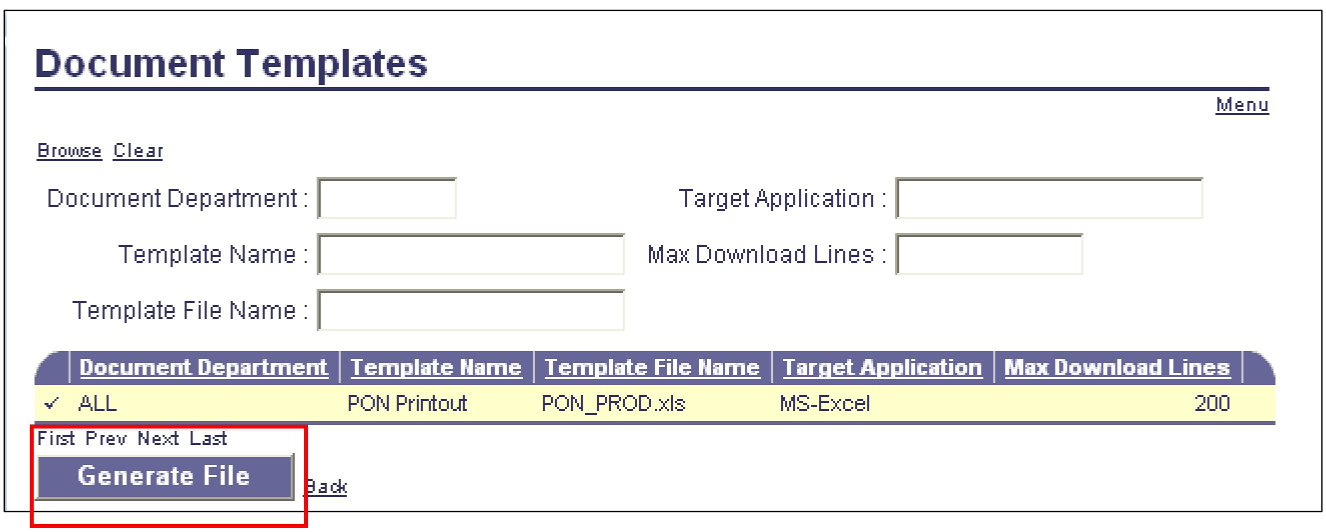
Printing the Proof of Necessity (PON) section of the PON2 document.

The Proof of Necessity (PON) section of the document is used by the Government Contract Review Committee and will not be incorporated into the assembled version of the Personal Service Contract. However, the PON section of the document can be printed and kept for office records. The printed PON section is created from a file generated from the Action Menu of the PON2. Follow the bellow steps to print the Proof of Necessity section. (Security Macros have to be enabled in order to view the PON document properly).

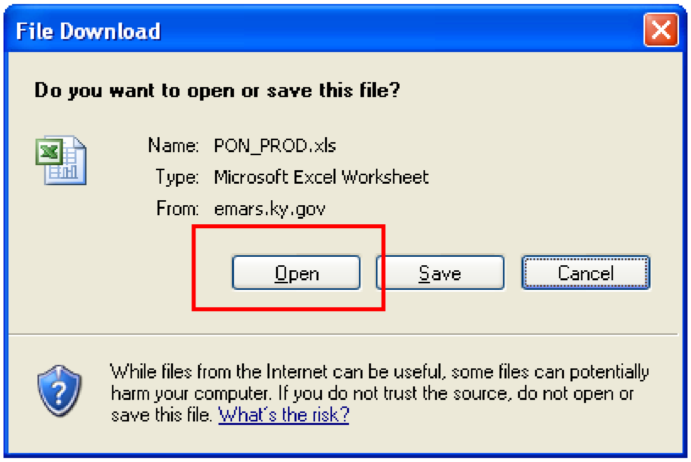
Open the Action Menu, and select File Download Document



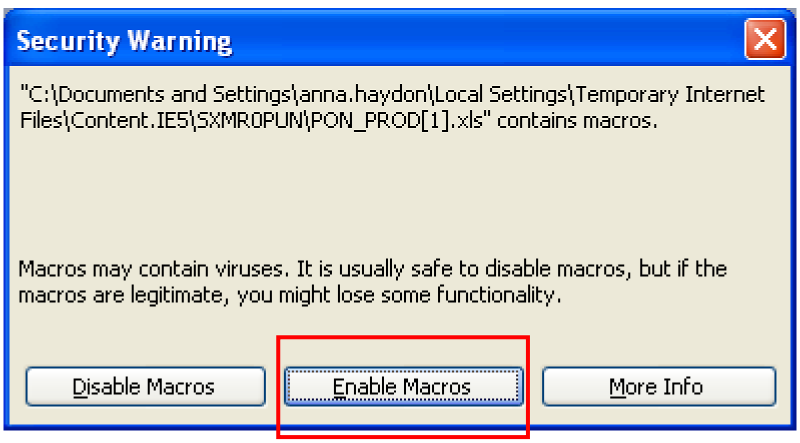
Click Generate File to create the PON printout.



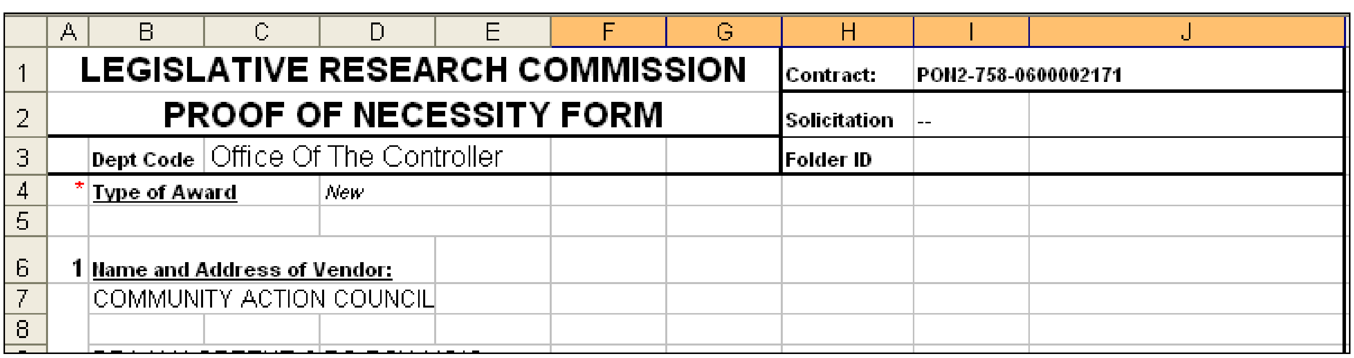
Open the spreadsheet generated from the document templates page.



At the security warning prompt, select Enable Macros



View/Print/Save the PON Printout for office records.

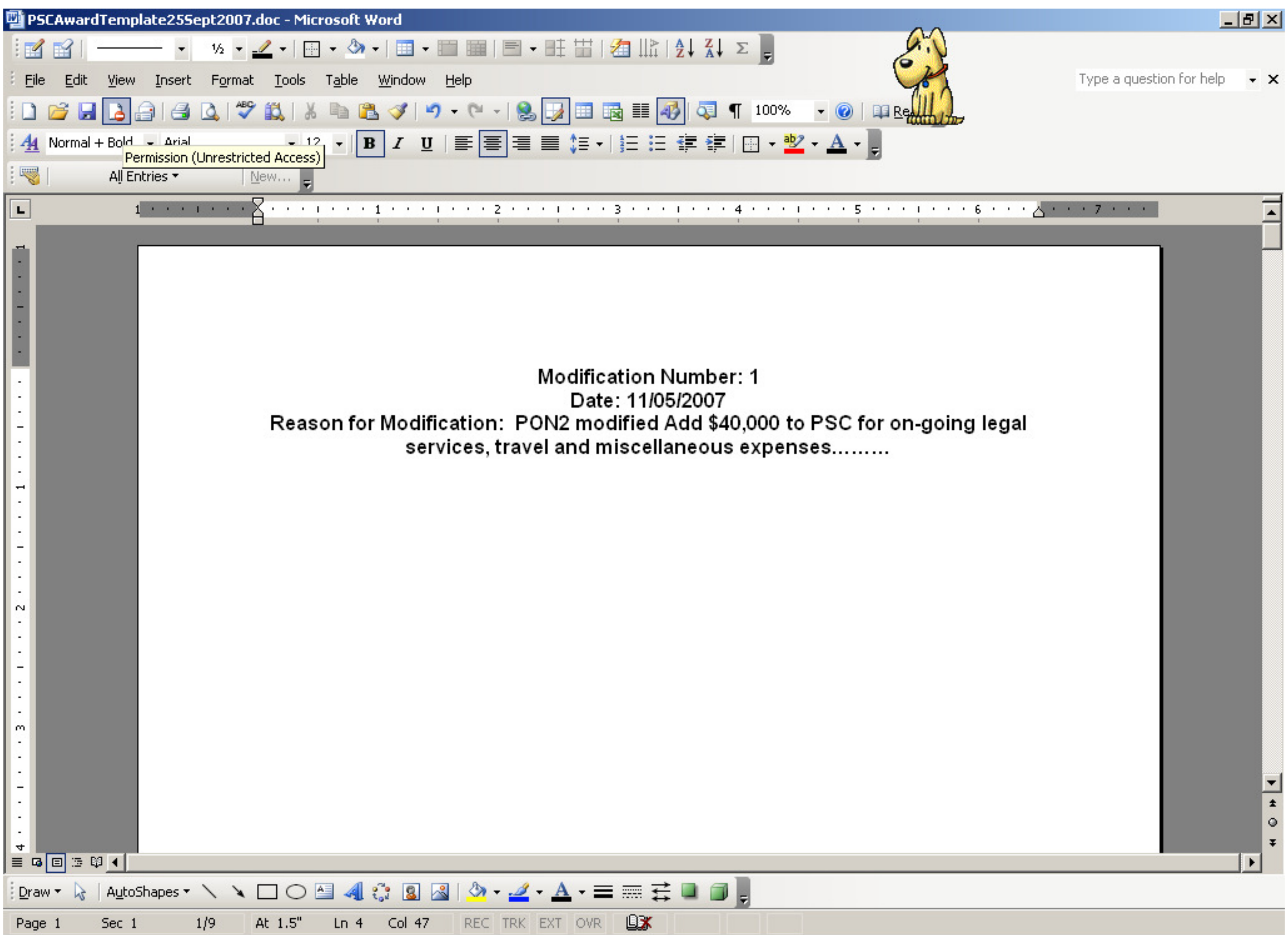


Note: The PON Print out is for office records only. It should not be uploaded as an attachment to the PON2 document itself.

Modifying your PON2

When modifications need to be completed on the PON2, it is important to document what changes are being made and where. The correct section of the PON2 document to identify the changes will be the Terms and Conditions section of the document. The Office of Procurement Services (OPS) is asking that you add a page to the beginning of the Terms and Conditions attachment identifying the Date, *Modification Number* and the *Reason for the Modification*. Once these changes have been added to the Terms and Conditions document it will need to be Saved to your desktop and Uploaded in the Terms and Conditions section through the Action Menu. The pervious attachment will need to be Deleted and the new attachment with the Reason for Modification will need to be added in its place.

Prior to users assembling their documents, select a *Default Form* in the *Header* of the contract. The *Default Form* helps determine what form your assembled document should be formatted. It is important when you select a default form in the *Header* of the document, that you select the same form when you assemble the document. For example, when modifying your *PON2* document, you choose the modification default form. During the assembly, you must also choose the modification form prior to submitting the *Assemble Request*.



8 - Processing Personal Service Contract/Memorandum of Agreement Exempt from the GCRC review on the PO2.

The **PO2** is the decentralized award document to be used by departments to establish Personal Service Contracts, Memorandum of Agreement, or Federal Grants exempt from review by the Government Contract Review Committee or for Non-Professional Service Contracts.

From an application perspective the **PO** document is largely identical to the **PON2** document. There are, however, two key differences:

1. On **PON2** documents the Proof of Necessity component must be completed.
2. On **PON2** documents payment is initiated by performing the copy forward action to a Payment Request (**PRC)** document. Whereas, a **PO2** document is paid through the automated payment matching process. For **PO2s** the user must process an **IN** document (Vendor Invoice)

Purchase Order two way match Document

Access the **Procurement Workspace**. Click **Create Stand Alone Document**, select **Create Stand Alone Awards**, and click **Contract 3 Way Match (PO).**

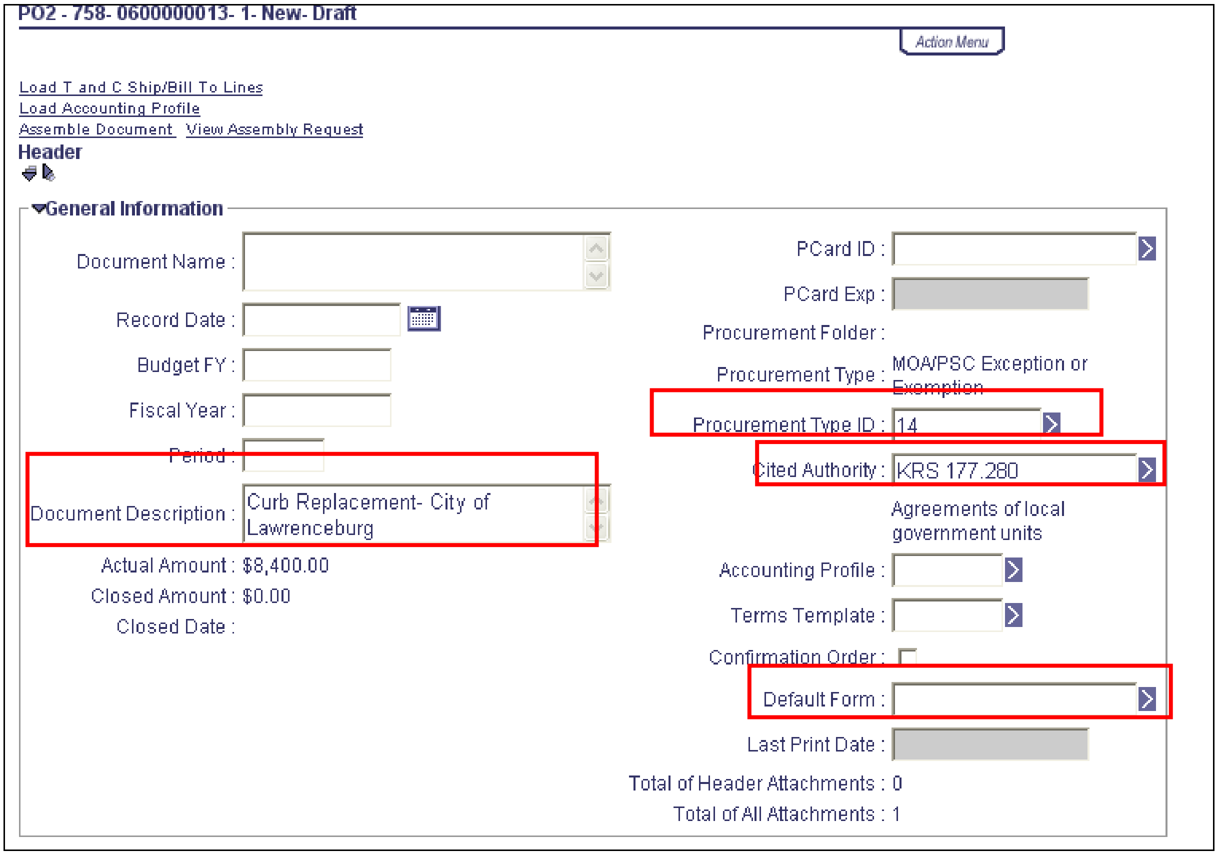
Click **Create** to change into Create mode.

Enter the document **Department Code** and **Unit Code** from the Student Card.

Click **Auto Numbering**.

Click **Create** to create the **PO2** document. The document opens to the **Header** page.

Complete the required and optional information in the **Header** section:



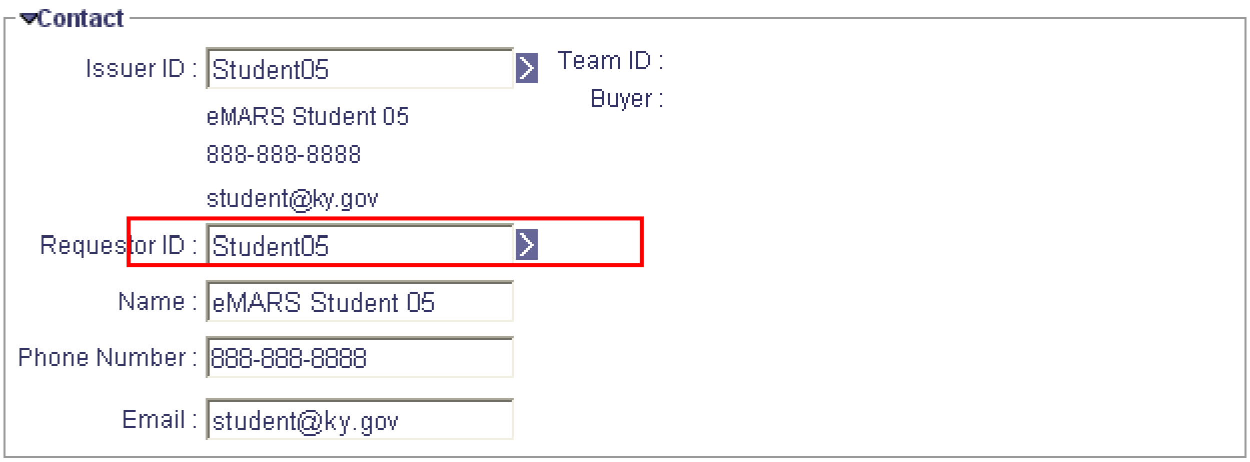
- The **Document Description** is required and does print-out. The description is also searchable from various inquiries like the Procurement Document Inquiry (**PRCUDOC**).
- Select a **Procurement Type ID** that corresponds to the business process being followed.

NOTE: It is important to select the Procurement Type prior to selecting the Cited Authority, in order to filter the choices to only those that are compatible

- The **Cited Authority** represents the authority which enables a user to enter the specific document for the amount specified on the document. This list is pre-filtered by your selection in the **Procurement Type** field.
- You may wish to select an **Accounting Profile** to populate the **Accounting Distribution** section. Once you have selected an **Accounting Profile**, click **Load Accounting Profile** to populate the **Accounting Distribution** section with the Accounting lines associated with the profile. The profile is comprised of one or more Accounting templates, which equate to a common coding string, or a single Accounting line. You may also wish to establish the funding for the document by assembling a template or templates on the **Accounting Distribution** section, or entering the **Fund** and **Detail Accounting** information directly on the **Accounting Distribution** section, or on the Commodity Lines.

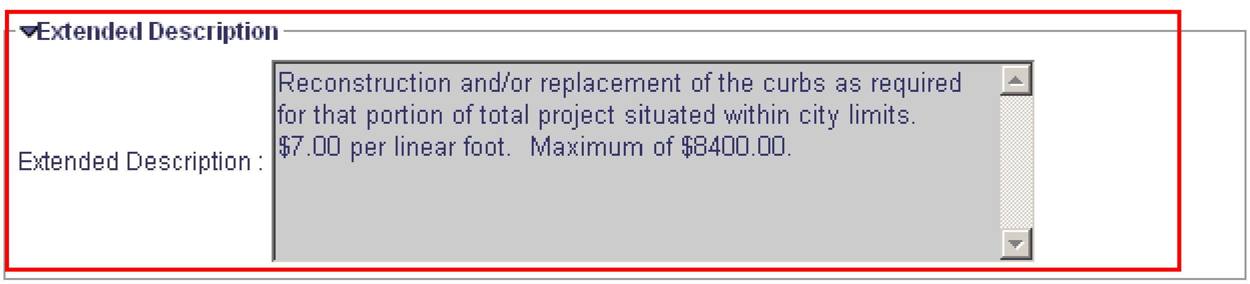
NOTE: Do not enter a **Budget FY**, **Fiscal Year**, or **Period**. They will be automatically populated for you when the document is submitted to final.

Complete the Purchase Order **Contact** section:



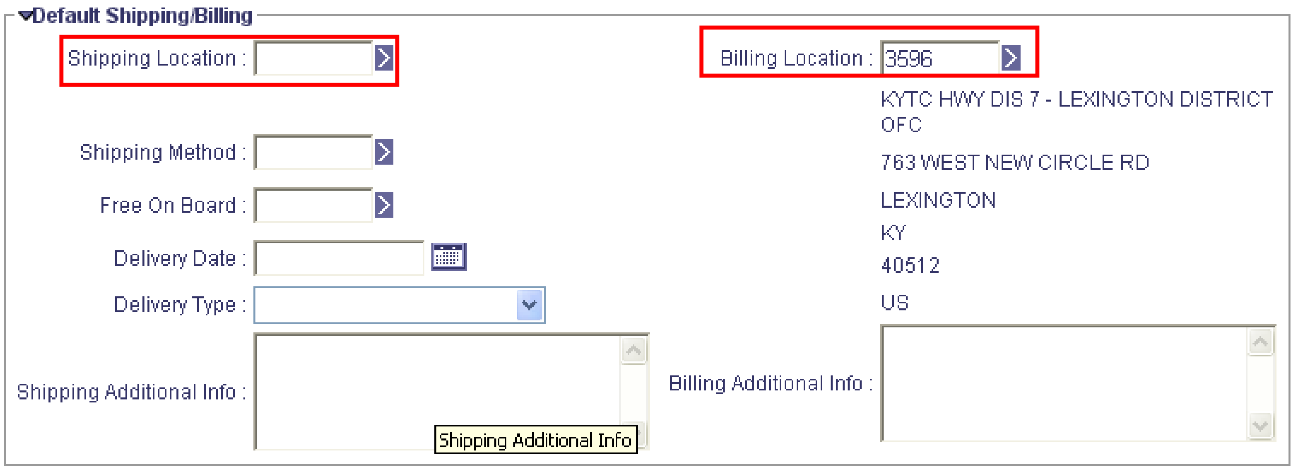
- The **Issuer ID** field will default to your information. If your are completing the document on someone else's behalf then pick their record from the pick-list by clicking on the **arrow** next to the **Issuer ID** field.
- The **Requestor ID** field will be blank and you will need to complete this field. The **Requesting ID** field is used to identify for whom the goods or services are being requested, (e.g who will actually be using the items or services detailed on this Requisition). Pick their record from the Requestor pick-list by clicking on the **arrow** next to the **Requestor ID** field.

Complete the **Extended Description** Field (optional).



- The **Extended Description** field can be used to further describe the nature of the requirements being requested. This field can store up to 1500 characters of text. This field does not print.

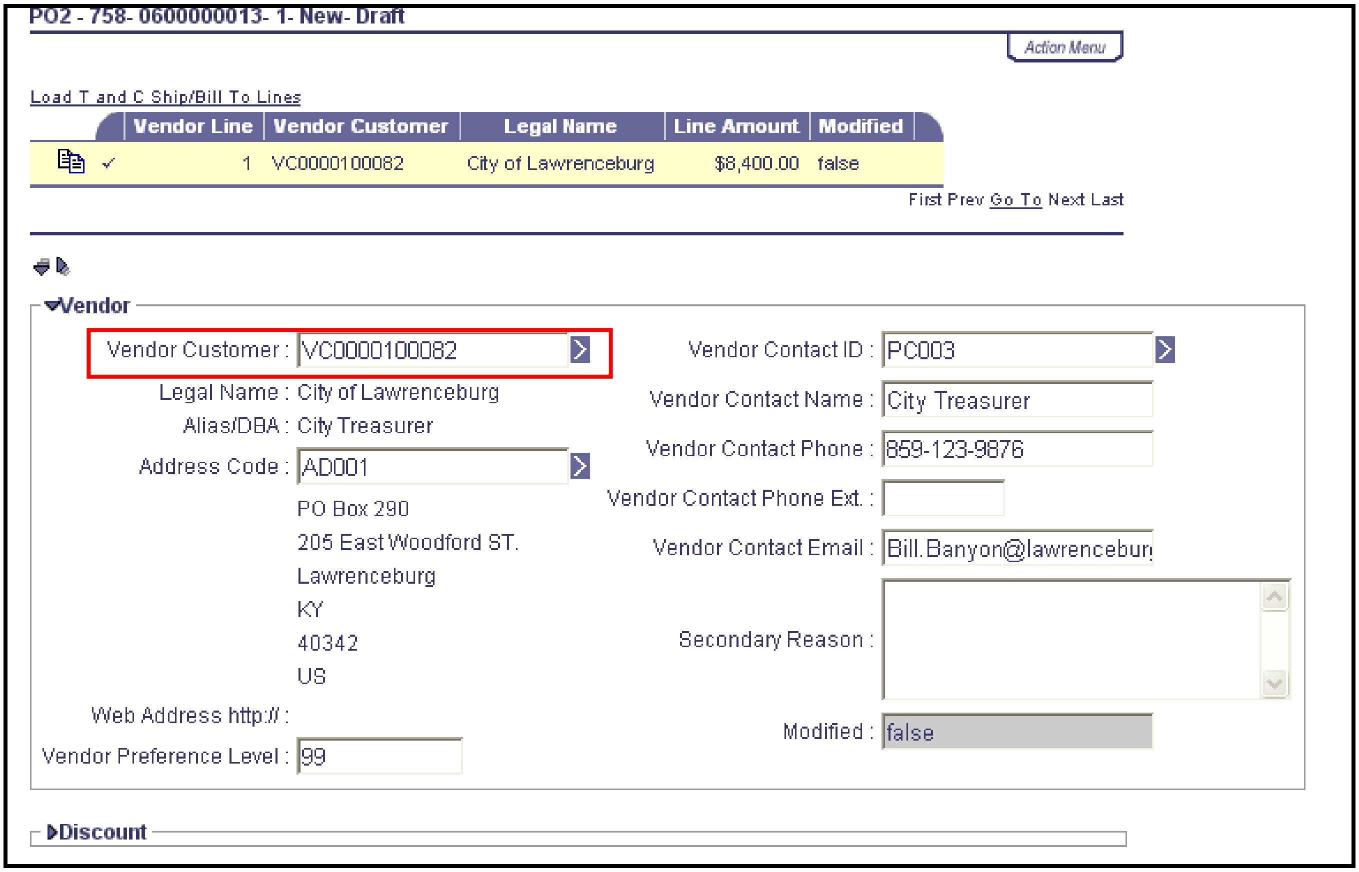
Complete the **Default Shipping/Billing** section. If the same Shipping and Billing information should be used on all lines or most lines of the Purchase Order then complete this section. When you are creating Commodity line items you may click **Ship/Bill To Lines** to have this information automatically populated on the line item. (Optional)



- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. To select a **Shipping Location** click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location (PLOC)** reference table. The **Shipping Location** field is only required on **PO2** documents for each Commodity line with a **Line Type** of "**ITEM**"
- The **Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.
- The **Delivery Date** field is used to enter the date by which you will need the goods being requested to be delivered.

NOTE:	Do not complete the **Shipping Method**, **Free on Board, Shipping additional information, Billing Additional Information** and **Delivery Type** fields. These fields are not required. These fields do not print-out.

Complete the **Vendor** Section.



- The **Vendor Customer** code field is used to store the eMARS Vendor Code for the Vendor being recorded. Click the **Pick List** to open the **Vendor Customer** list. You may search for a Vendor by **Legal Name**, **Last Name**, **Alias**, and/or **Vendor Active Status**.

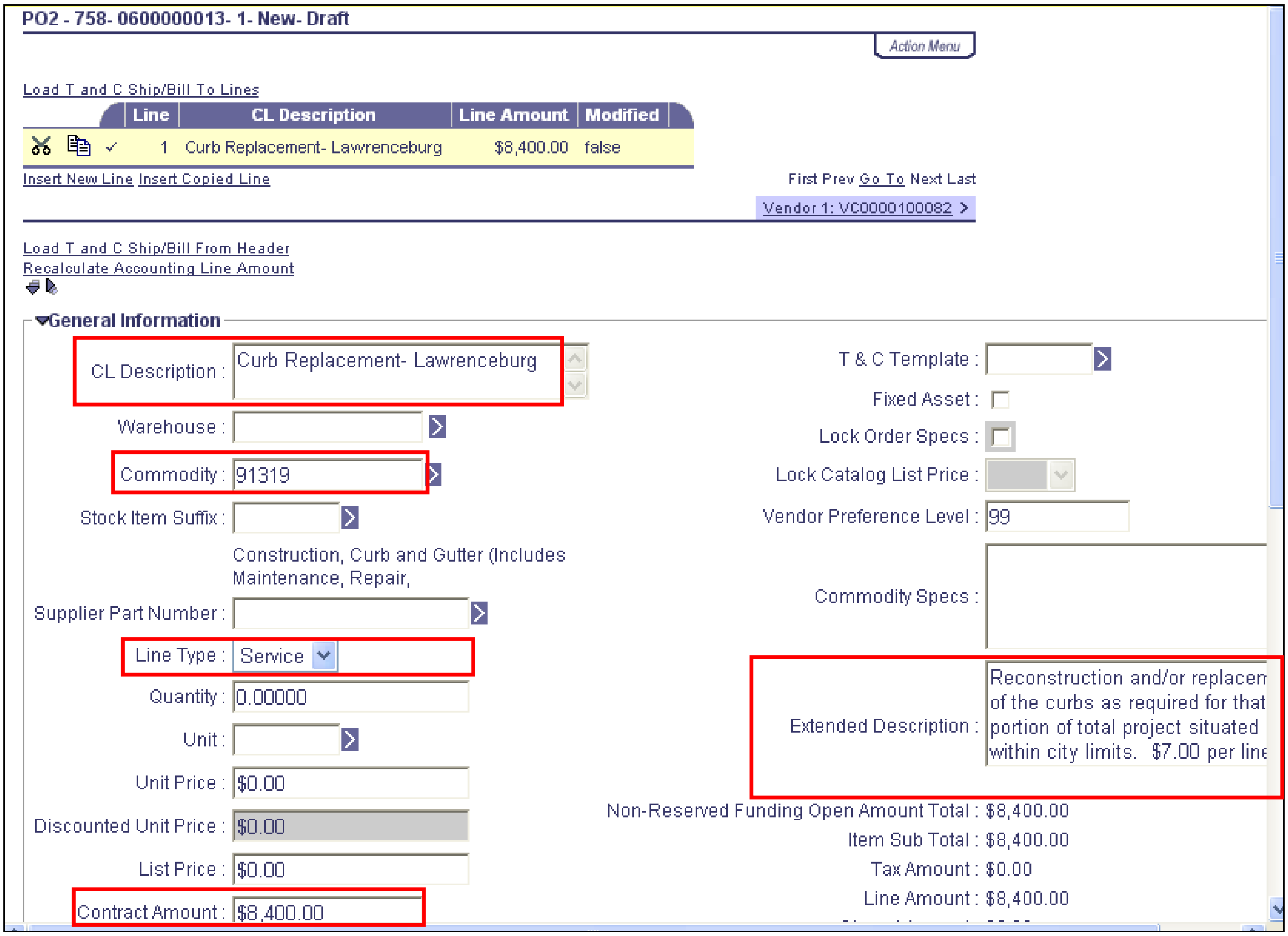
NOTE: If you know part of the Vendor Code field you may type it into the **Vendor Customer** field using wildcards. When you click on the **arrow**, the Vendor pick-list will be filtered by the value you have entered.

NOTE: The **Vendor Address ID** and **Contact Information** may default to this document when it is validated, if there is a default indicated on the vendor's record.

NOTE: If this document was generated from an Evaluation document then the **Vendor** section will be pre-populated.

Build **Commodity** Lines. The **Commodity** section of the Contract is used to list all distinct goods or services being requested.

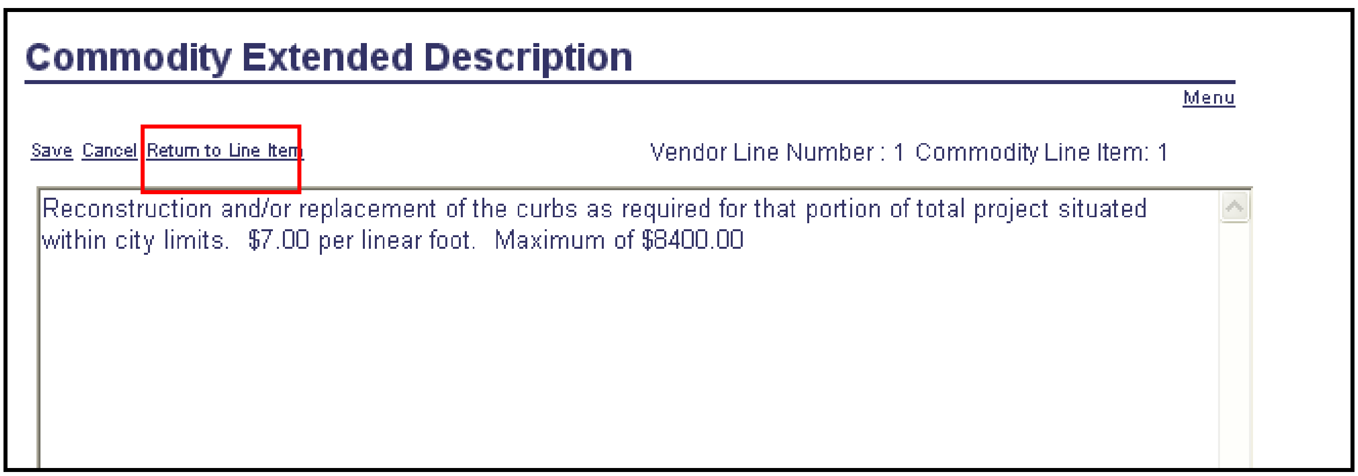
Complete the required fields for the Commodity **General Information** section.



- The **CL Description** field should be used to record a brief description of the good or service being requested. This field does print-out on all documents and is used on subsequent Procurement Documents. This field is displayed in the grid area of the **Commodity** section in order to help you identify which line you would like to inspect or modify.

- The **Commodity** field is used to store the five digit NIGP commodity code that most closely matches the item or service being purchased. This field is used primarily for classification purposes. When creating a Contract it is important to make the first commodity the one that is most relevant to the Contract as a whole. The first Commodity code is used by EMARS to determine which office will receive the Contract for processing.
- The **Line Type** field is used to select how the cost of the line item will be established. Generally speaking, goods should be recorded with a **Quantity**, **Unit of Measure** and **Unit Price** and services should be entered as **Contract Amount**.
    - When you know the **Unit Price** a Line Type of "**Item**" should be selected. The **Unit of Measure**, **Unit Price**, and **Quantity** are required.
    - If the unit cost is unknown or not applicable the lump sum cost of the line should be recorded in the **Contract Amount** field. In this case a line type of "**Service**" should be selected. When the line type is service then the **Service From** and **Service To** dates are required. These dates are the effective dates for resultant award document.
- The **Extended Description** field should be used to provide a detailed description of the desired item. Up to 4000 characters of information can be stored in this field. To access a larger field in which to type the extended description click on the **More Text** link.

NOTE: To insert a TAB into the **Extended Description** field the user must type [**Ctrl**]+[**Tab**]. To cut and paste, the user must use the [**CTRL**] + [**C**] / [**CTRL**] + [**V**] keyboard shortcut.



Complete the **Shipping**/ **Billing** information section.

- The **Shipping Location** field is used to identify where the goods requested on the Requisition should be delivered. Click on the **arrow** next to the **Shipping Location** field to access the **Shipping Location** pick-list. If you already know the **Shipping Location** code you may record it directly in this field without accessing the pick-list. The **Shipping Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

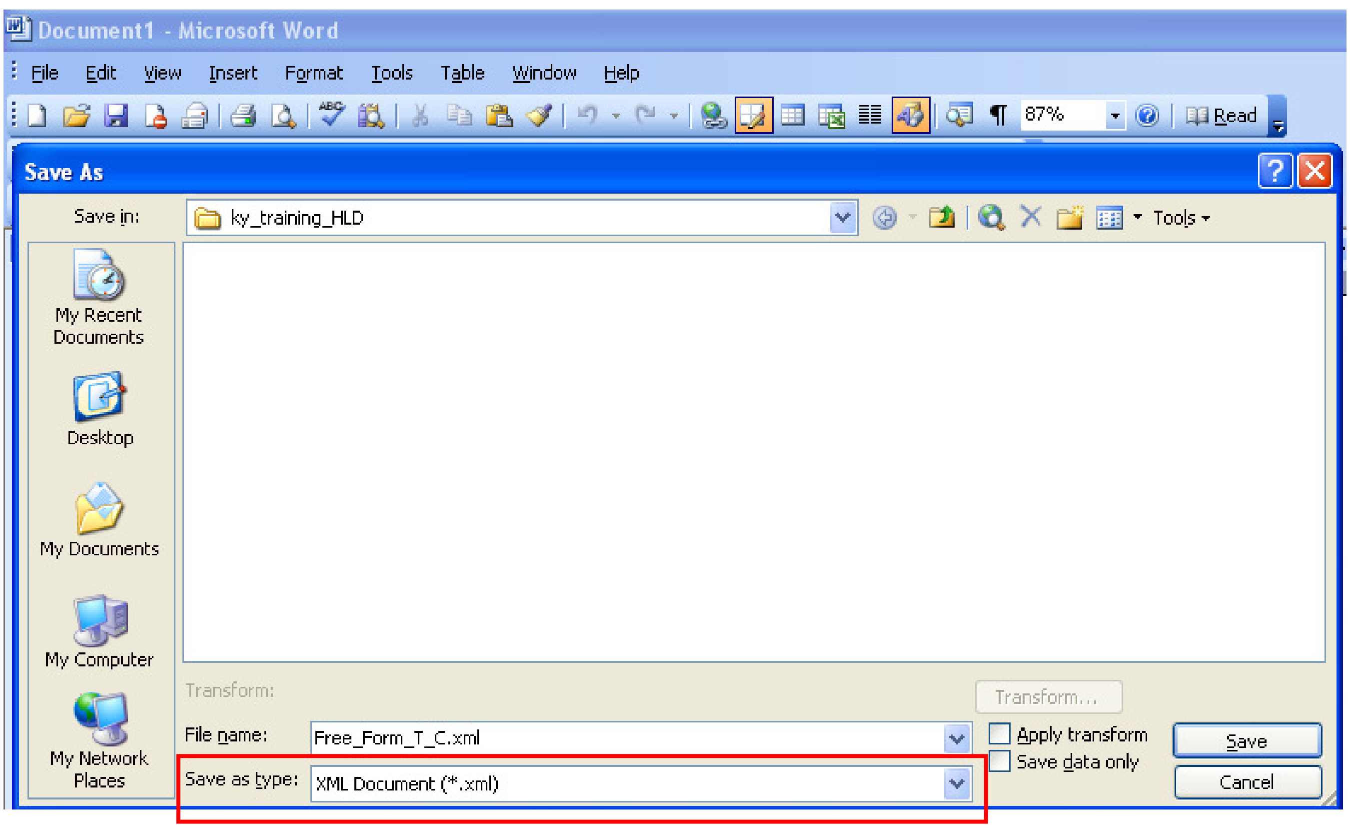
- **The Billing Location** field is used to identify where the Vendor's Invoice should be mailed. Click on the **arrow** next to the **Billing Location** field to access the **Billing Location** pick-list. If you already know the **Billing Location** code you may record it directly in this field without accessing the pick-list. The **Billing Location** code, however, must be valid on the **Procurement Location** (**PLOC**) reference table.

Complete the **Specifications** section (Optional). This section may be used to record additional information that you feel should be stored separately from the Commodity Line extended description.

Add **Terms and Conditions**.

- The **Terms and Conditions** panel lists all the **Terms and Conditions** that will be assembled into the Final Version of the Contract. You may attach a Word **XML** document that you have created yourself or you may pick a **Terms and Condition** record from the eMARS database.

- The MS-Word documents that you would like to include must be saved in MS-Word as **.XML** before they can be attached.



When creating your MS-Word T&C document observe the following rules:

Do's:

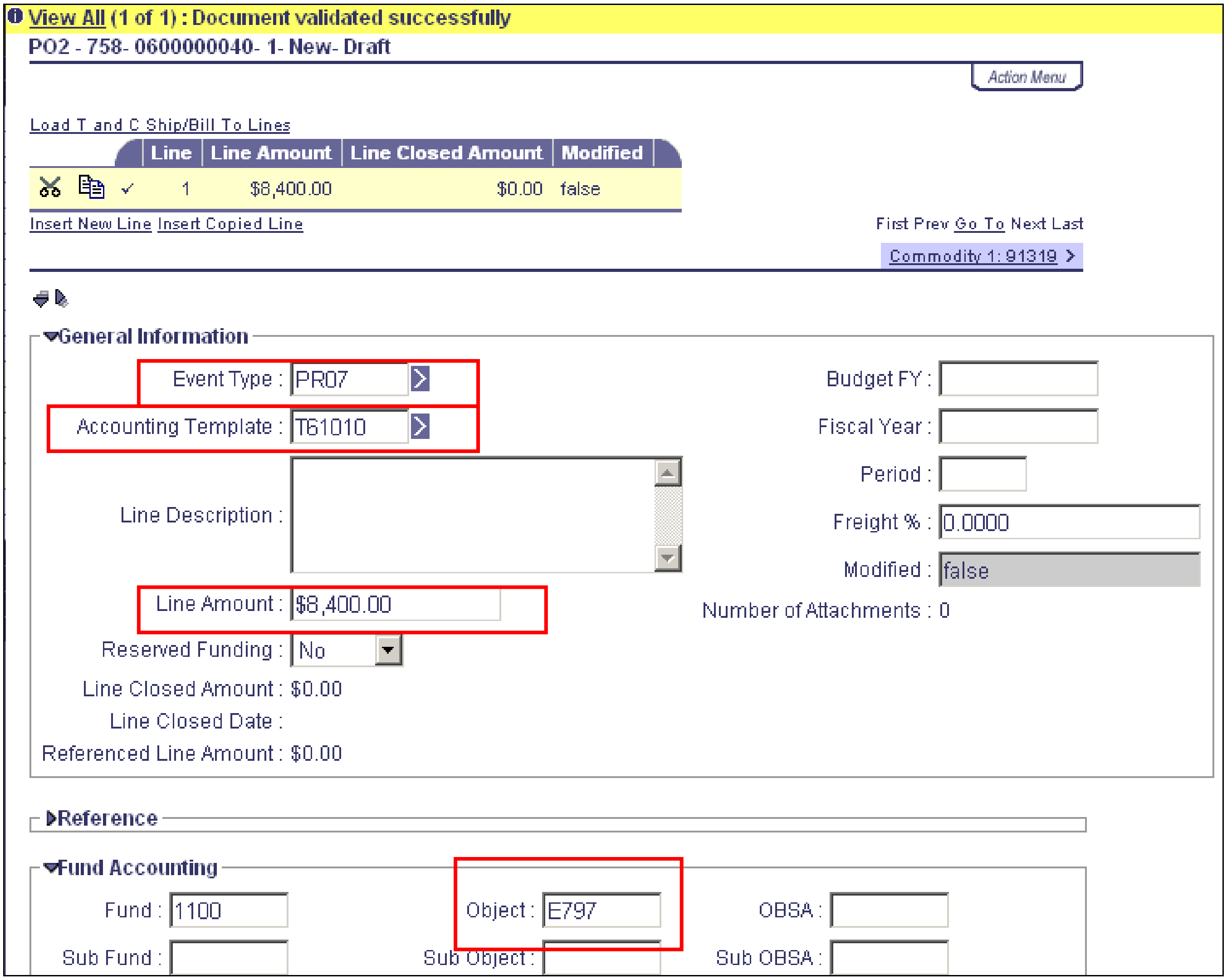
- Do ensure you are utilizing Word 2003 before attempting to edit **T&C**.
- Do set your top margin of your Word Document to 1.5.
- Do save the document as an .**XML** file.
- Do add Supporting Documents when necessary. These documents must also be in .**XML** format, but they will appear below the **Terms and Conditions** when the document is assembled. If multiple attachments are used, there will be a page break between each attachment. If you insert a line accidentally, you need to delete it by using the scissor icon.
- Do use "Normal" formatting for all text.
- Do use "Grid" formatting for all tables.
- Do clear all formatting, and then reformat your bolding, bullets, and justifications if using an existing document for the first time.
- Do select the "Free" **T&C**, then delete the attached file and upload your .**XML** document. If you have inserted a link to a picture(s) in your document, you must upload the picture file(s) after you have uploaded the .**XML** file.
- Do attach any type of document, regardless of file type in the **Header** section.

Don'ts

- Don't use Section breaks – the assembly process stops at the first section break.
- Don't use Page breaks – these are ignored in the assembly process.
- Don't use Track Changes.
- Don't add **T&Cs** to the **Commodity T&Cs** section – add to the **Terms and Conditions** section only.
- Don't insert blank lines in the **Supporting Documents** section.
- Don't insert objects directly into the document.
    - If you have a picture, you must insert as a link to the file.
    - Attach any documents as **Supporting Documents** or in the document **Header** section.

Build the Accounting line(s). Each Commodity line listed in the document will need at least one Accounting line.

Complete the required fields for the Accounting General Information section.



The **Event Type** is used to determine what posting codes will be used while also bringing in specific rules for data entry concerning referenced transactions, customer codes, vendor codes and all defined chart of account elements in the system. The **PO2** document uses the following **Event Types**:

Encumbering Event Types

- **PR05**- Order from External Vendor
- **PR06**- Order from Internal Vendor

Non-Encumbering Event Types

- **PR07**- Order

Select the **Accounting Template** by selecting the pick list next to the field. Accounting Templates are used to populate the Fund and Detail Accounting elements in the document. Elements of the Accounting Template are inferred after the document is validated. Any values entered by the user either before or after the template has been inferred will override any values from the template.

Indicate the **Sub Total Line Amount**. This is the amount that is allocated to this Accounting Line. The sum of all Accounting Lines must equal the referenced Commodity Line.

Note the Fund and Detail Accounting elements. These elements will be inferred if an Accounting Template is used or may be added by the user.

Click **Validate** to check for errors.

To Assemble:

1. From the **Header** Section click on **Assemble Document**
2. Click **Submit Assemble Request**
3. Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4. Click **Back** to return to the document

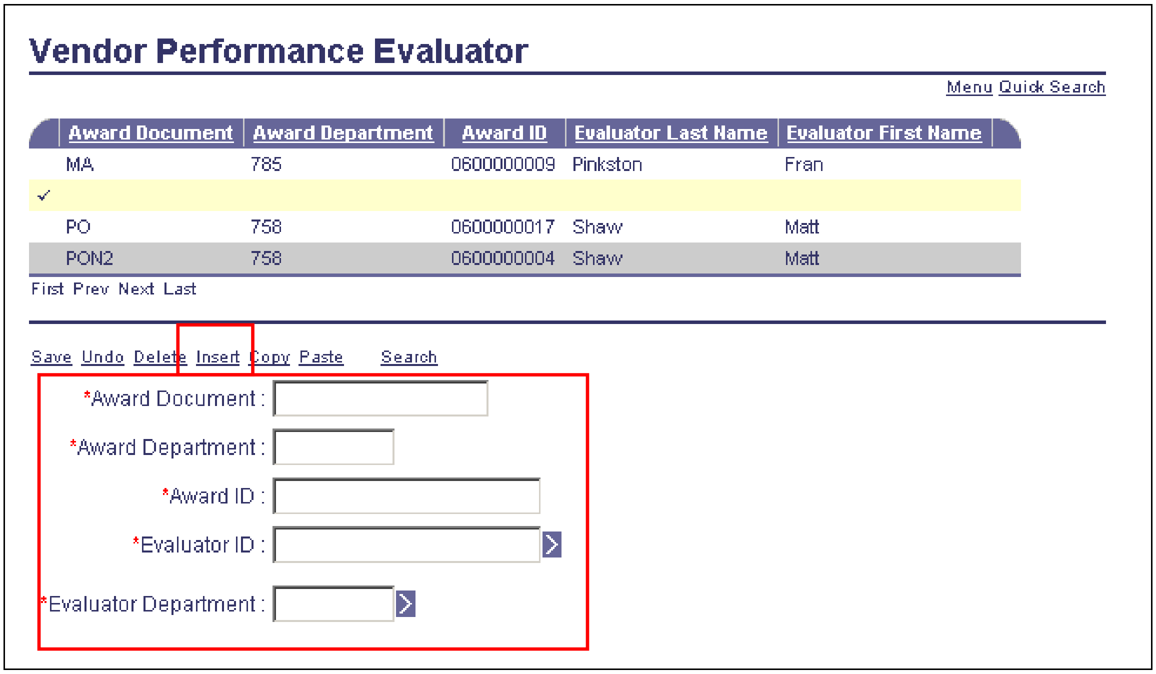
To Print the Assembled Form:

1. Return to **Header**
2. From the **Action Menu**, select **Attachments**.
3. Click **Download**.
4. While the **PDF** document is open use the **File Menu Options** to either print or email the document.

Submit the document to initiate workflow for approval.

Navigate to the **Performance Evaluator Table** (**PEEVALR**) by clicking on the **Home** action button, click on **Search** and click on **Page Search**. Enter **"PEEVALR"** into the **Page Code Field** and click **Browse.** Click on **Vendor Performance Evaluator** to open the page.

Click **Insert** to add a new row to the table.



- In the **Award Document** field, enter the document code on the document for which you wish to establish the Evaluator information.
- In the **Award Department**, enter the department shown on the Document **Header** of the document for which you wish to establish the Evaluator information.
- In the **Award ID**, enter the **Document ID** of the Contract Award just submitted.
- In the **Evaluator ID** field, enter your ID from the pick list, and
- In the **Evaluator Department**, enter the department for the Evaluator entered in the **Evaluator ID** field.

Multiple rows may be entered for as many evaluators as are necessary for each award.

Exercise 4 – Process a stand-alone PO2 for Memorandum of Agreement exempt for GCRC review.

Scenario

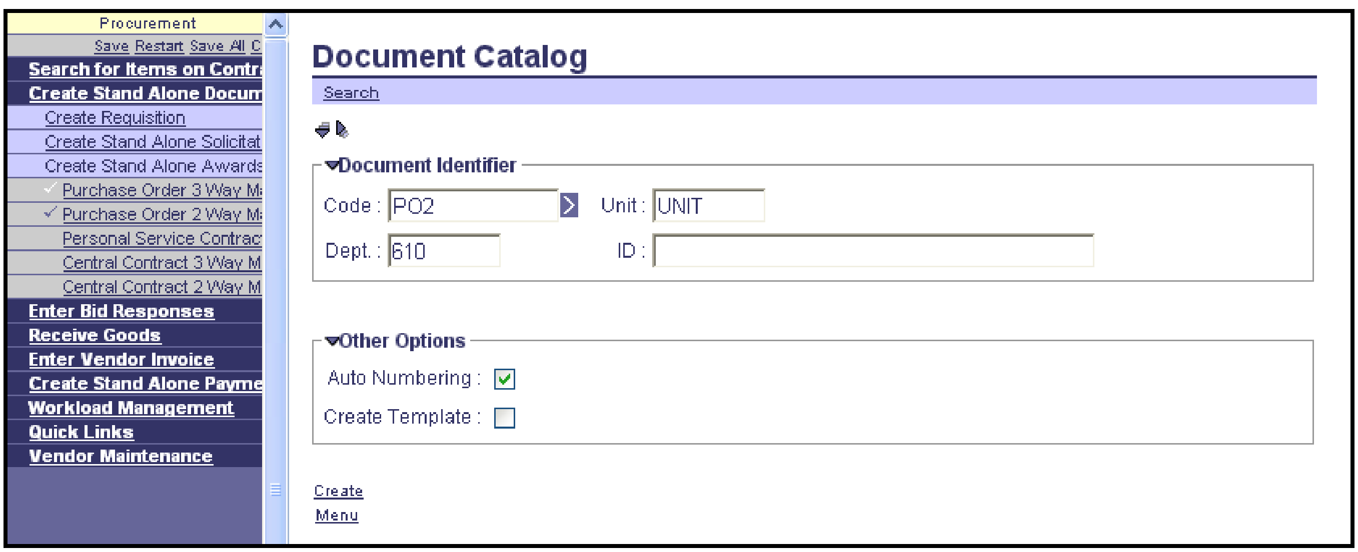
You are in the Transportation Cabinet and you need to establish an Agreement with the City of Lawrenceburg for a Curb maintenance program.

Task Overview

Create a Purchase Order (**PO2**) (Two Way Match) document from your **Procurement Workspace**. You will build **Terms and Conditions** and select a **Vendor**. You will enter a single **Commodity** line and **Accounting** line. <u>You will change the default **Event Type** for the document to be non-encumbering.</u>

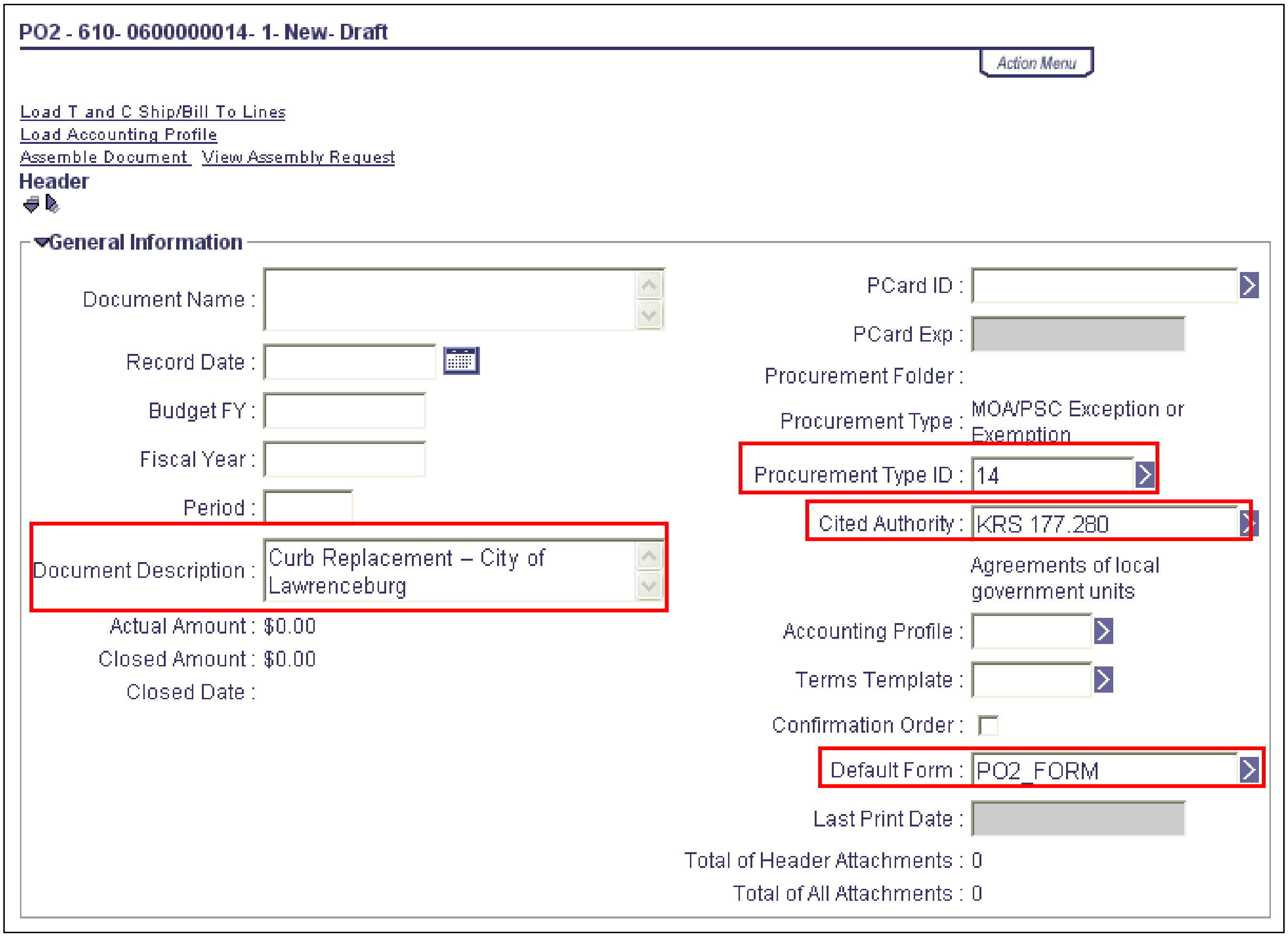
Procedures

1. Access your <u>**Procurement Workspace**</u>.
2. Click <u>**Create Stand Alone Document**</u>, expand <u>**Create Stand Alone Awards,**</u> and click <u>**Purchase Order 2 Way Match (PO2)**</u> Click <u>**Create**</u>.



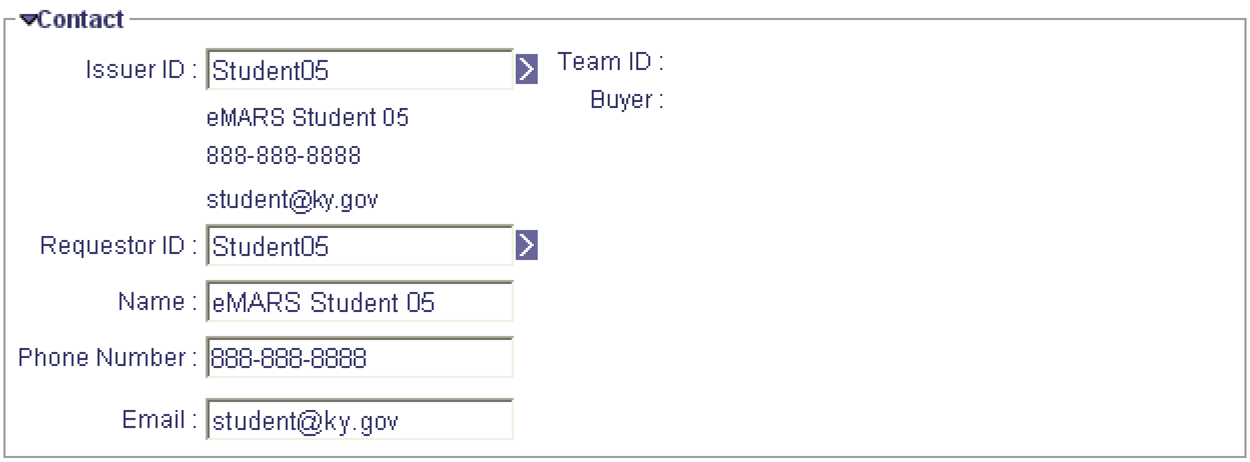
Required Fields	Values
Code	**PO2**
Dept	Enter: **610**
Unit	Enter: **UNIT**
Auto Numbering	**Click to select**

3. Click **Create**. The PO2 document opens to the **Header** page.
4. Complete the required and optional information in the Purchase Order **Header**:



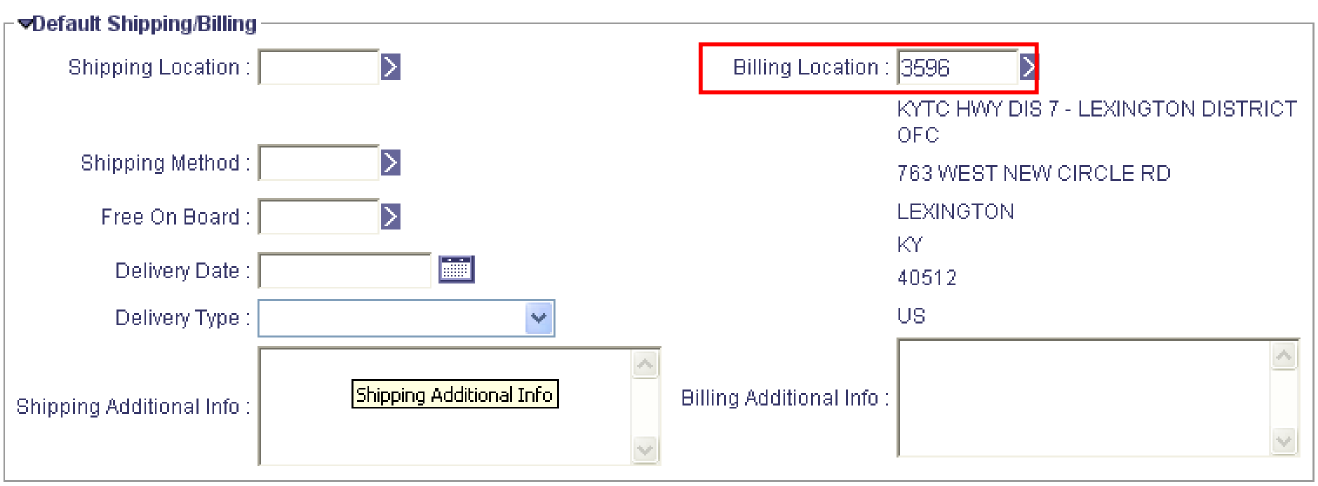
Required Fields	Values
Document Description	**Curb Replacement – City of Lawrenceburg**
Procurement Type	**14** Select from the Pick List
Cited Authority	**KRS 177.280**
Budget FY	**Leave blank.**
Fiscal Year	
Period	
Default Form	Enter: **PO_FORM**

5. Complete the **Contact** Section:



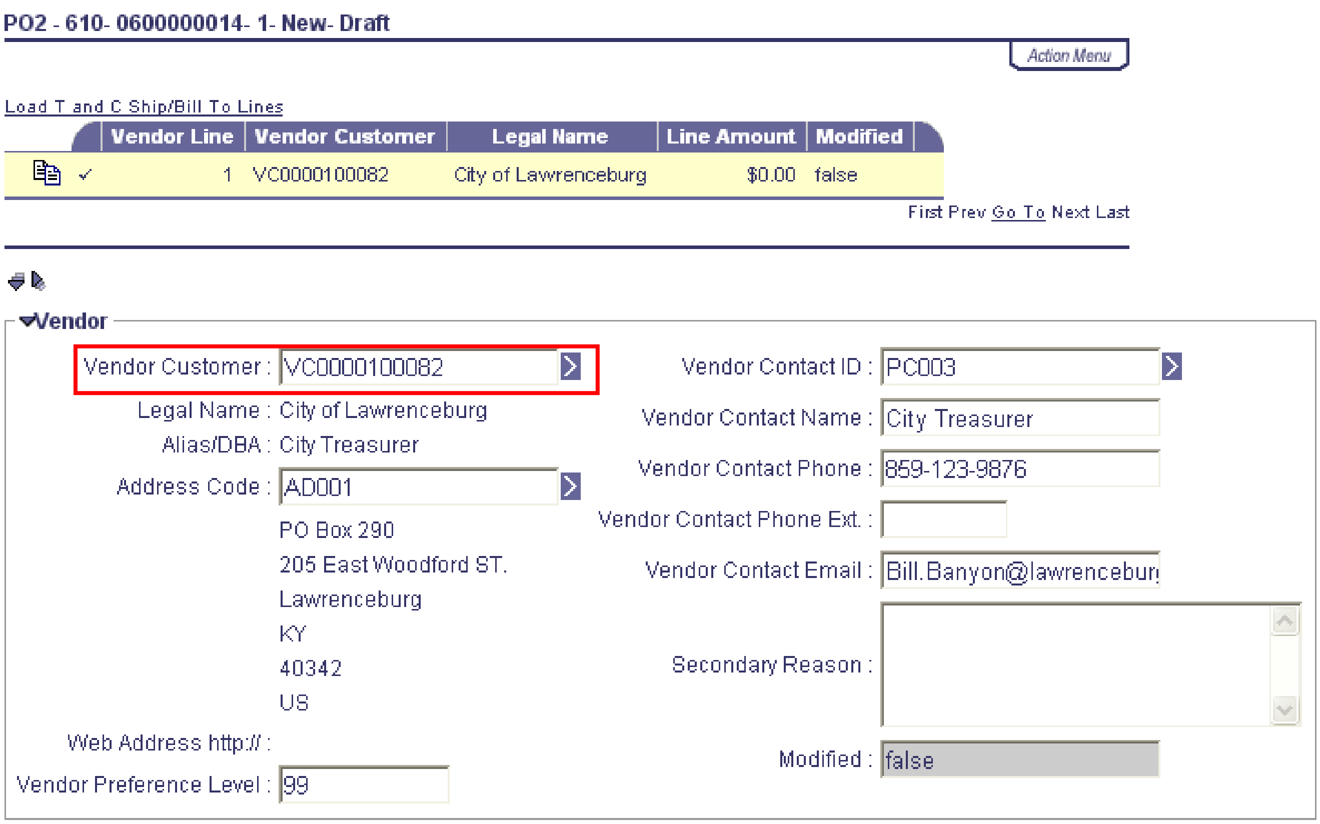
Required Fields	Values
Issuer ID	**Leave as is**
Requestor ID	**Select your Student ID** from the Pick List

6. Complete the **Default Shipping/Billing** Section.



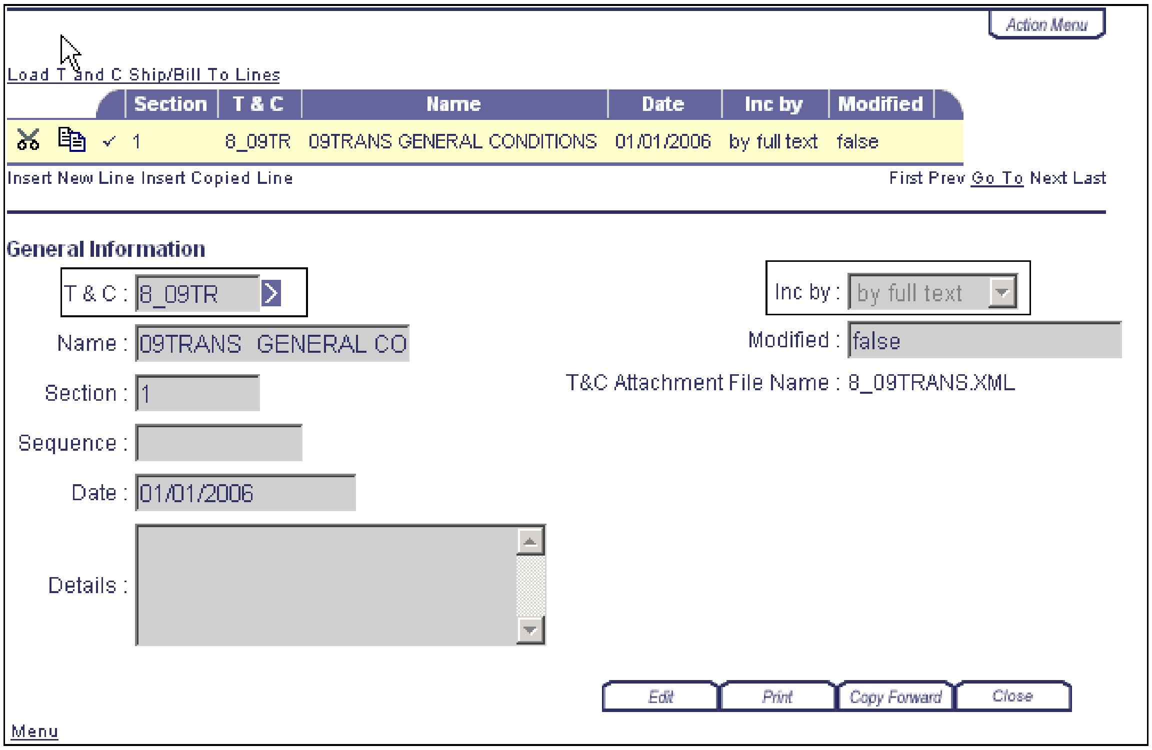
Required Fields	Values
Shipping Location	**Leave Blank**.
Billing Location	Select "**3596**"
Delivery Date	**Leave blank**
Shipping Method	**Leave blank**
Free on Board	
Shipping Additional Information	
Billing Additional Info	
Delivery Type	

7. Click **Vendor** on the Secondary Navigation Panel.



Required Fields	Values
Vendor Customer	**"VC0000100082"**

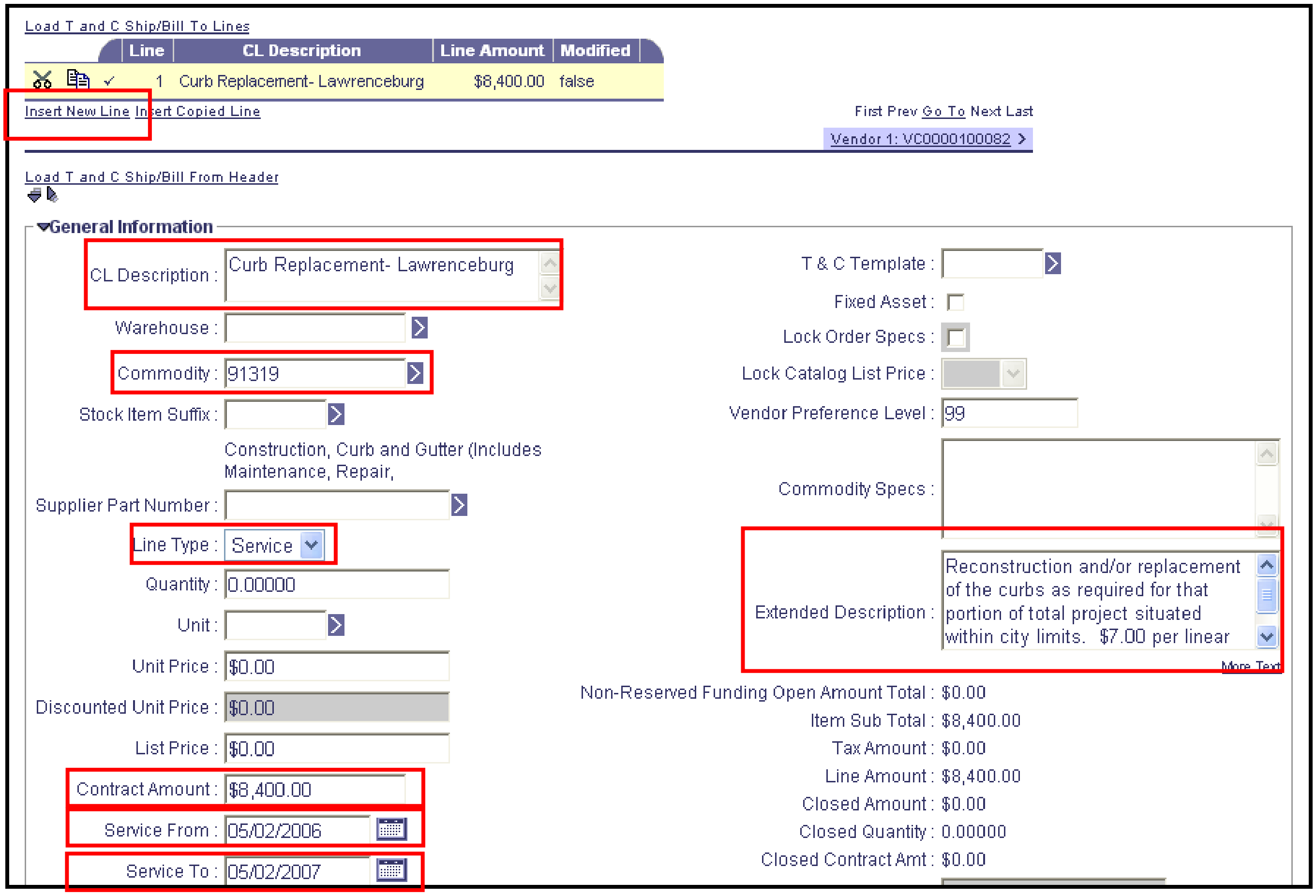
8. Click **Terms and Conditions** on the Secondary Navigation Panel. Click **Insert New Line**



Required Fields	**Values**
T&C	**"MOA1"**
Inc by:	**Select Full Text**

9. Click **Save** to load the default **Terms and Condition** information.
10. Click **Commodity** on the Secondary Navigation Panel. Click **Insert New Line**

11. Complete the required fields for the Commodity **General Information** section.

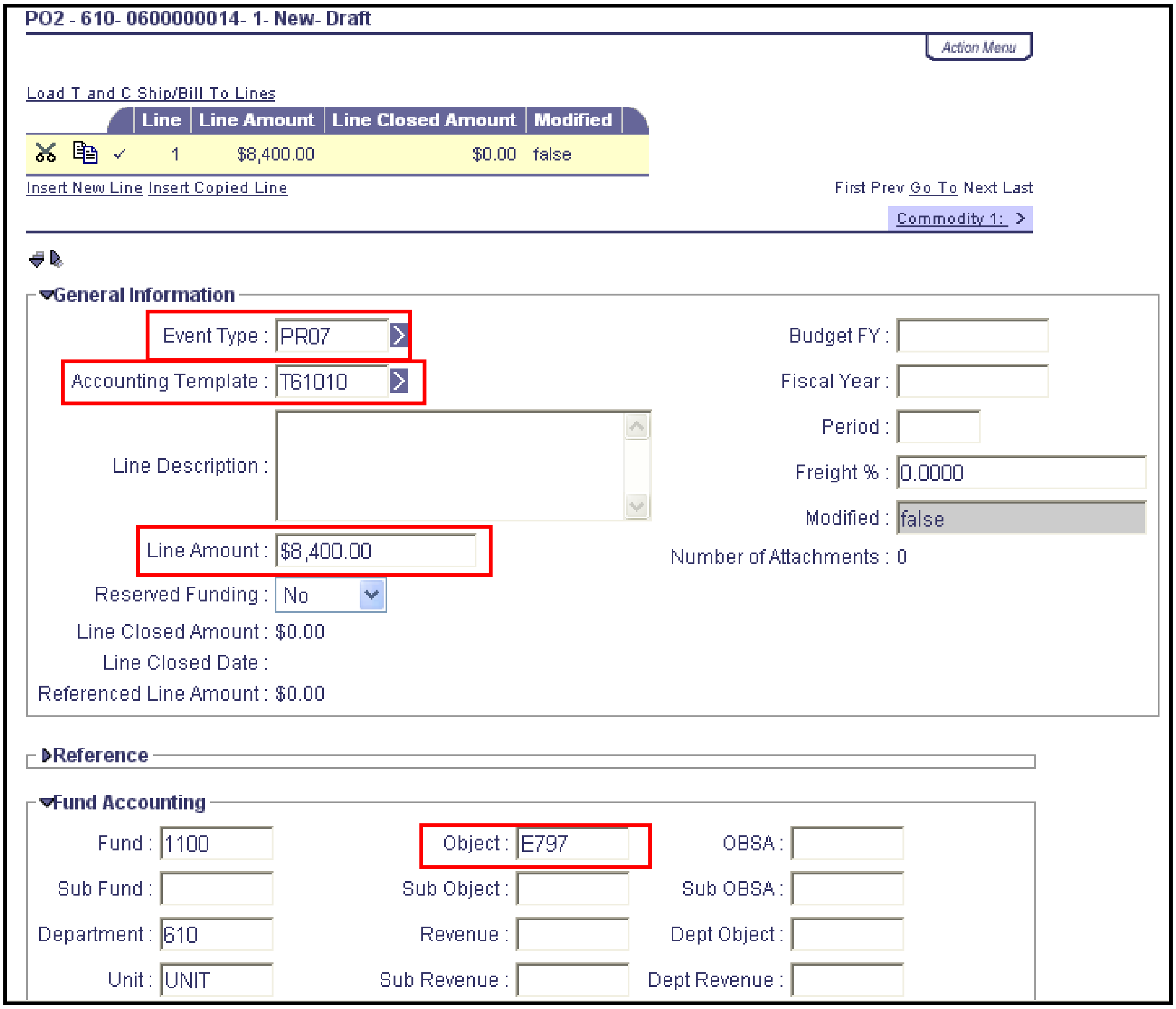


Required Fields	Values
CL Description	Curb Replacement- Lawrenceburg
Commodity	91319
Line Type	Service
Contract Amount	8400.00
Service From	Select "One Month from Today"
Service To	Select "Two Months from Today"
Extended Description	"Reconstruction and/or replacement of the curbs as required for that portion of total project situated within city limits. $7.00 per linear foot. Maximum of $8400.00"

12. Click **Ship/Bill From Header**

13. Click **Accounting** from the Secondary Navigation Panel.

14. Click **Insert New Line**. Complete the Required fields for the Accounting Line.



Required Fields	Values
Event Type	PR07
Accounting Template	T61010
Line Amount	8400
Object	E797

15. Click **Validate** to populate the Accounting elements associated with the Accounting Template.

To Assemble:

1 From the **Header** Section click on **Assemble Document**
2 Click **Submit Assemble Request**
3 Click on **Refresh**, You should see the status as Successful (You may have to click refresh a few times before the assembly job finishes and you see a Successful Status).
4 Click **Back** to return to the document

To Print the Assembled Form:

1 Return to **Header**
2 From the **Action Menu**, select **Attachments**.
3 Click **Download**.
4 While the **PDF** document is open use the **File Menu Options** to either print or email the document.

16. **Submit** the document to initiate workflow for approval.

9 – Performance Evaluation (PE)

In order to document a Vendor's record at meeting their contractual obligations, you should complete the Vendor **Performance Evaluation** (**PE**) document. The data entered on the **PE** document will be used to determine if Vendors should receive future Awards or have their existing Master Agreements renewed.

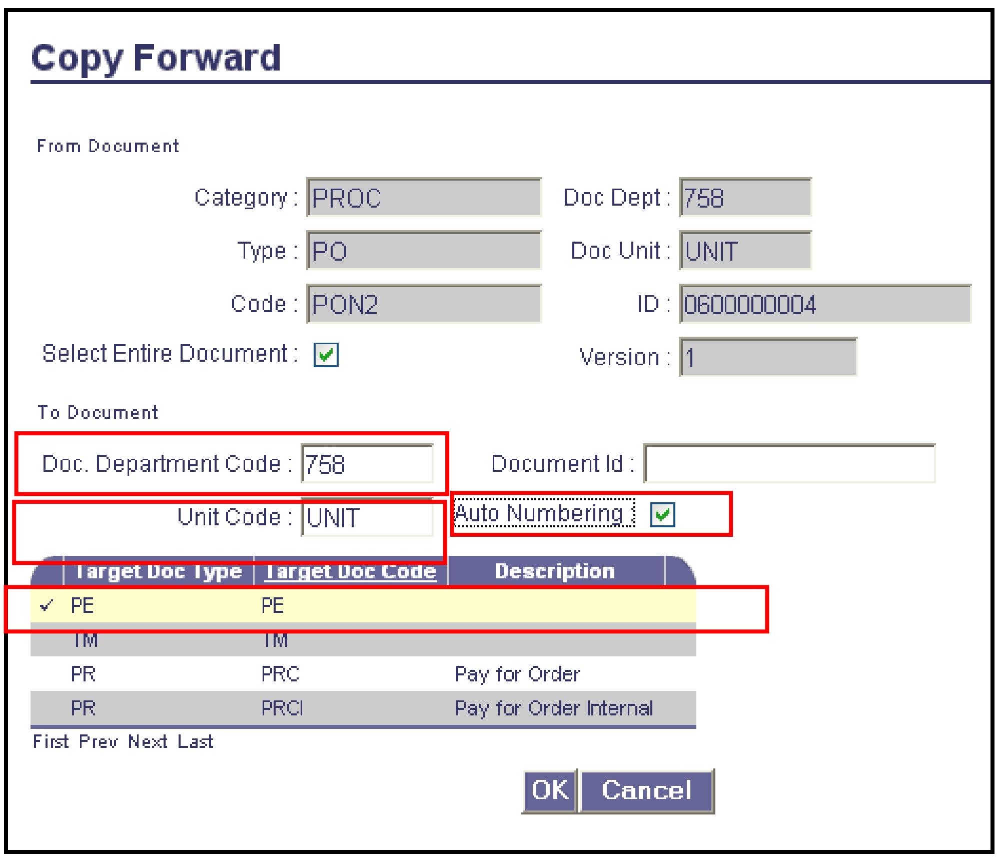
Evaluations are standardized based on the **Procurement Type** on the award document.

Evaluations can only be performed with reference to awards established in the system (**CT**, **DO**, **MA**, and **PON2**).

Vendor Performance

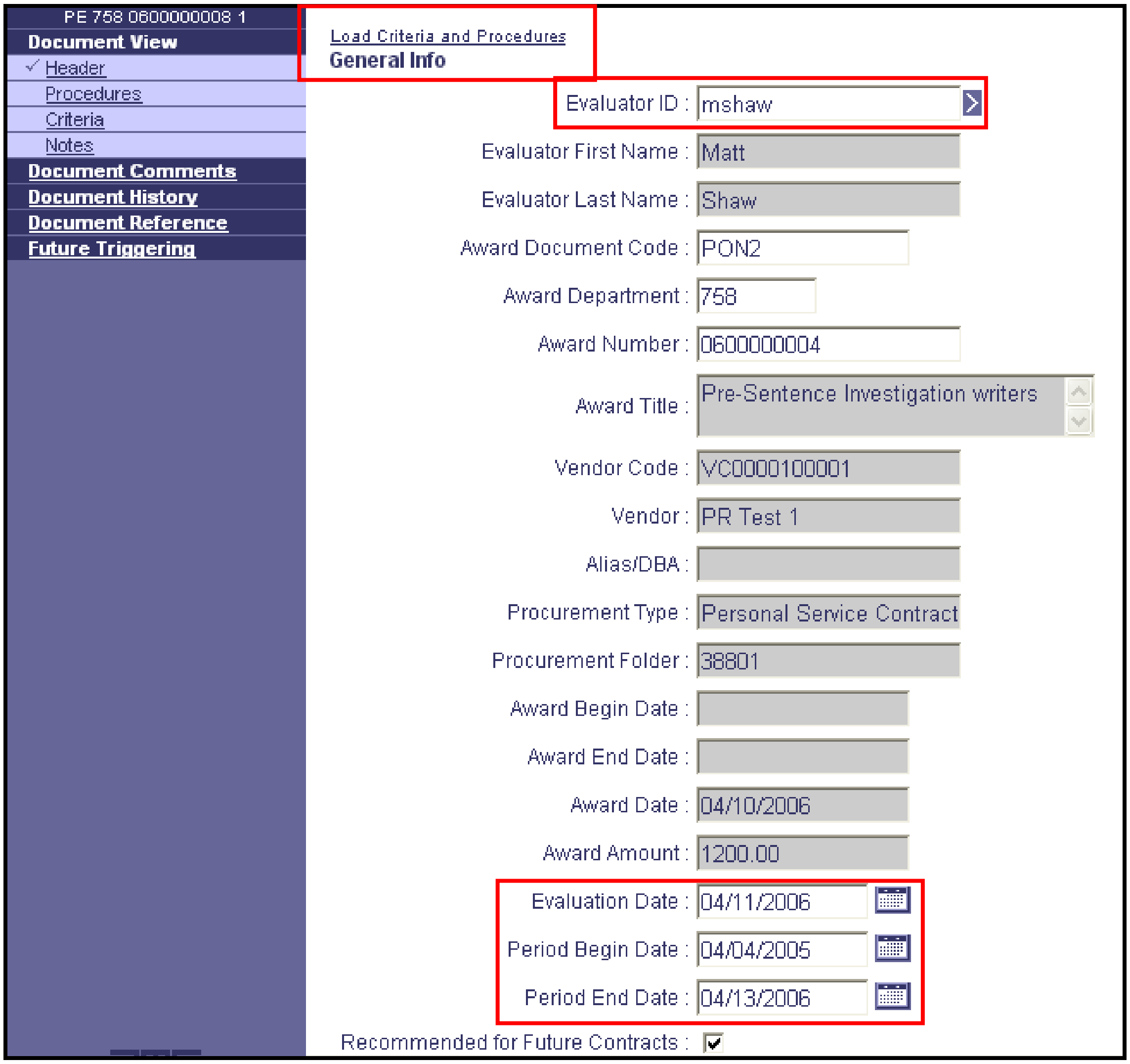
From the Document Catalog locate the award being evaluated. Open the award and click **Copy Forward**. The **Copy Forward** page opens.

On the **Copy Forward** page enter your **Document Department Code** and **Unit Code**. Select **Auto Numbering** to have eMARS generate the **PE** Document ID. Check **PE** for Select Target Doc Type. Click **OK** to open the **PE** document.



Complete the **General Information** section of the **PE**. This section is used to establish which eMARS user is performing the evaluation as well as the time period being assessed. Note that all the information from the award has automatically populated the **PE** document.

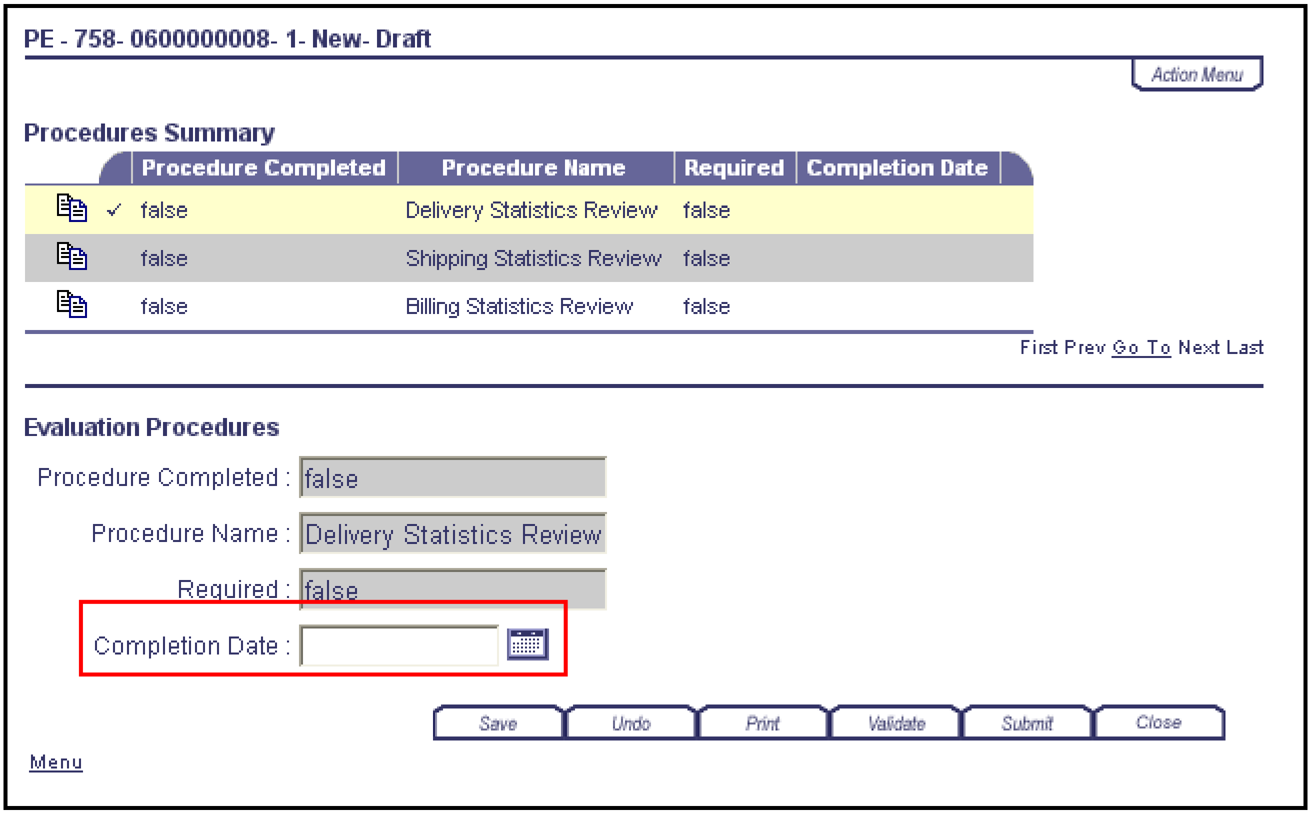
NOTE: It is the responsibility of the Buyer who established the award to set-up who will be performing the evaluation by making an entry on the Vendor Performance Evaluator (**PEEVALR**) table at the time the Award is submitted.



- **Evaluator ID**: Type in your User ID- or find your ID from the **Evaluator ID** pick list.
- The **Evaluation Date** is the date this evaluation is being completed. Enter the current date.
- **Period Begin Date** / **Period End Date**. Please enter the time period being evaluated.

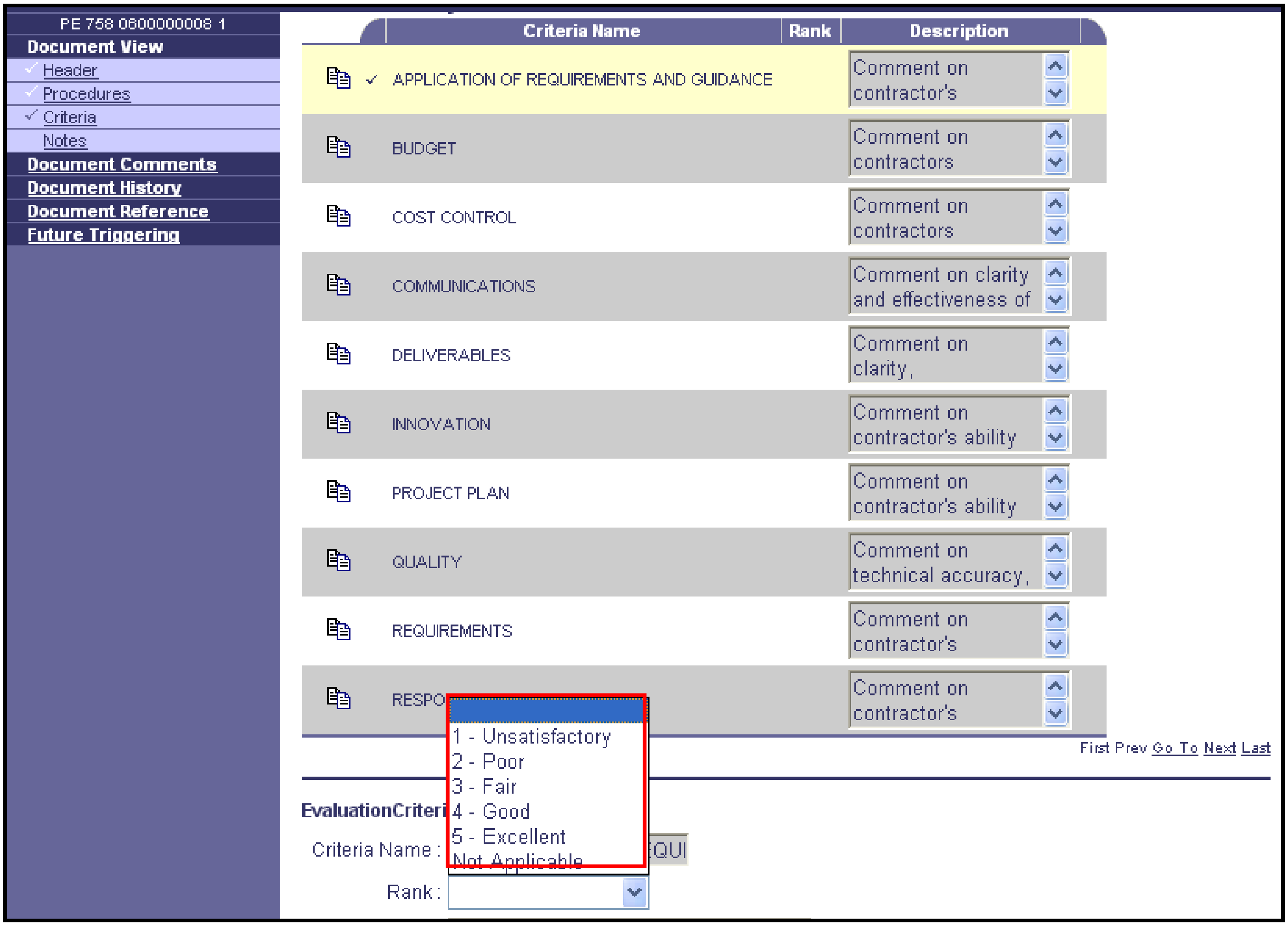
Click **Load Criteria and Procedures** at the top of the page to load the standardized **Evaluation Criteria** and the **PE** document procedures. Click **Procedures** in the Secondary Navigation Panel to transition to the Document Procedures page.

Document when all mandatory Procedures were completed by entering the date on which they were completed. Procedures are recommended tasks that be performed as part of the performance evaluation process.



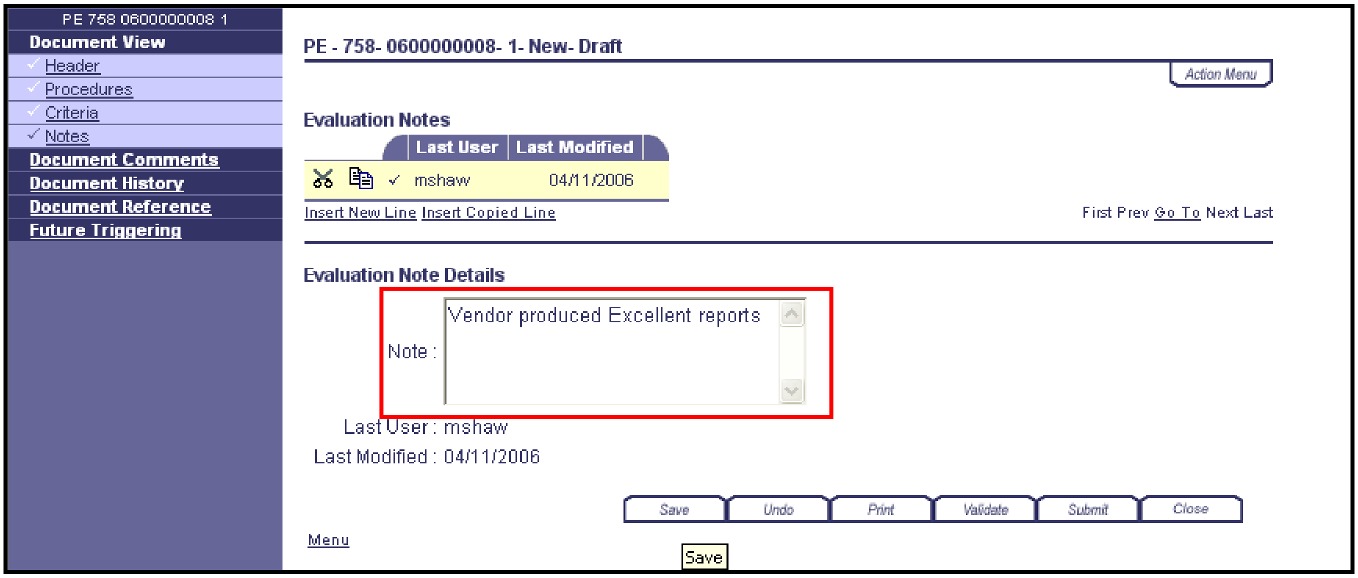
- The **Completion Date** is the date on which the Procedure was finished.

Click **Criteria** in the Secondary Navigation Panel to access the **Evaluation Criteri**a page. This page lists the Criteria that were loaded from the Vendor Performance Evaluation Template table. You must rank each of the criteria on this detail section (Unsatisfactory, Poor, Fair, Good, Excellent or Not applicable).



- The **Rank** field is used to record your opinion of the Vendor's service levels. You must record a Ranking for each criteria that was loaded from the template.

Click **Notes** in the Secondary Navigation Panel. The Notes page opens where you may record specific comments or anecdotal information supporting your evaluation / assessment.



- The **Note** field can record up to 1500 characters of information per Note. Please take the time to enter as much detail about your experience with the Vendor and your assessment of their performance against the award in question.

Click **Validate** to check for errors.

How to print the PE document:

Navigate to each section of the document starting at the Header section. Open up each field of the document that you want to view on your printed document. Once you have the fields open, right click on your mouse and select **Print Page.**

Submit the document to final.

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Exercise 5 – Record Vendor Performance (PE)

Scenario

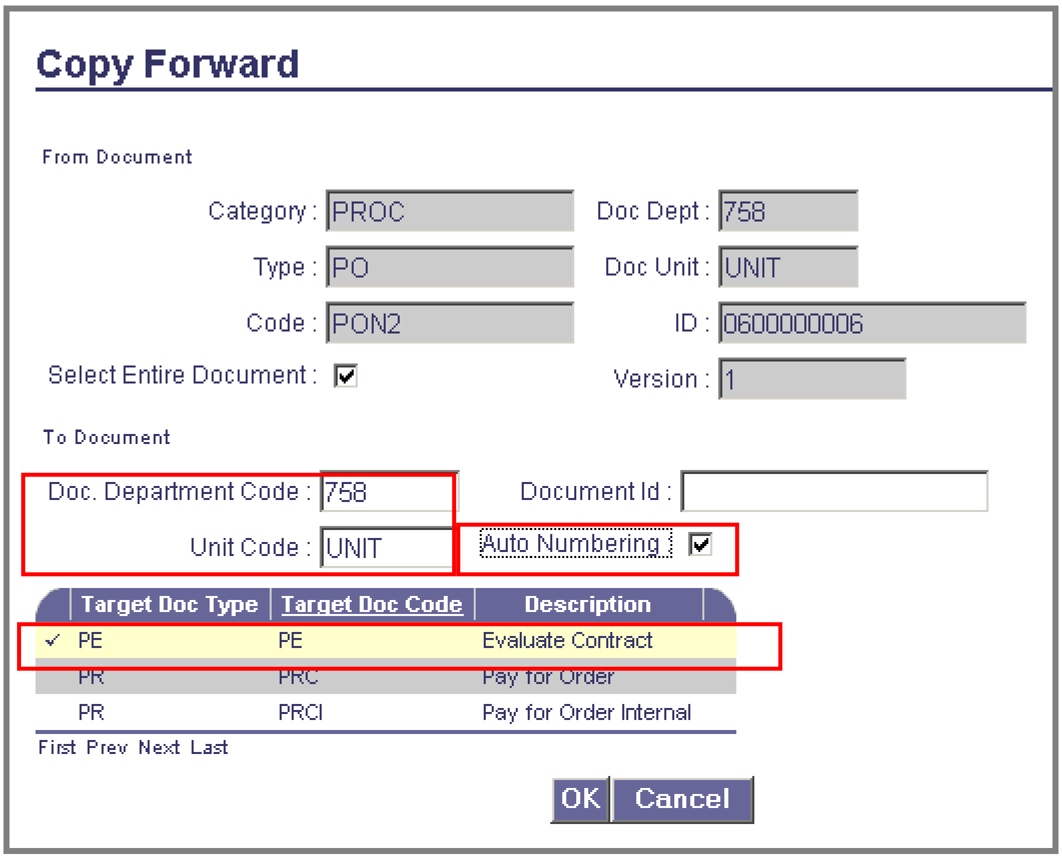
You need to document the vendor's performance for the Personal Service Contract you created in the previous exercise.

Task Overview

You will access the Contract document created in Exercise 3 and Copy Forward to a **Performance Evaluation** document (**PE**)

Procedures

1. From the Document Catalog locate **PON2 758 0600000006** listed on your Student card. Open the award and click **Copy Forward**. The **Copy Forward** page will open.

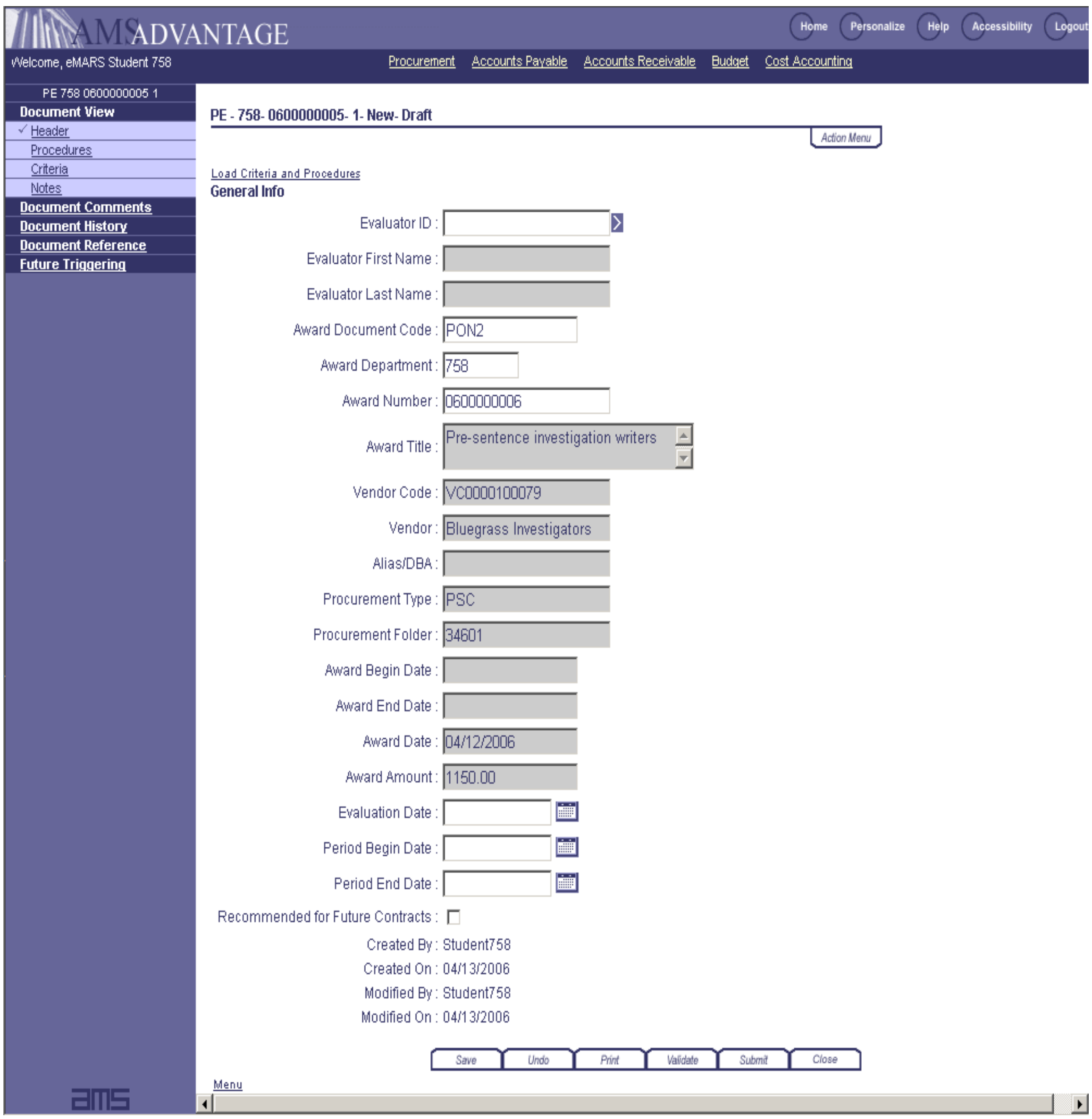


2. Enter the following required fields:

Required Fields	Values
Doc. Department Code	See Student Card
Unit Code	UNIT
Auto-Numbering	Select the check box.

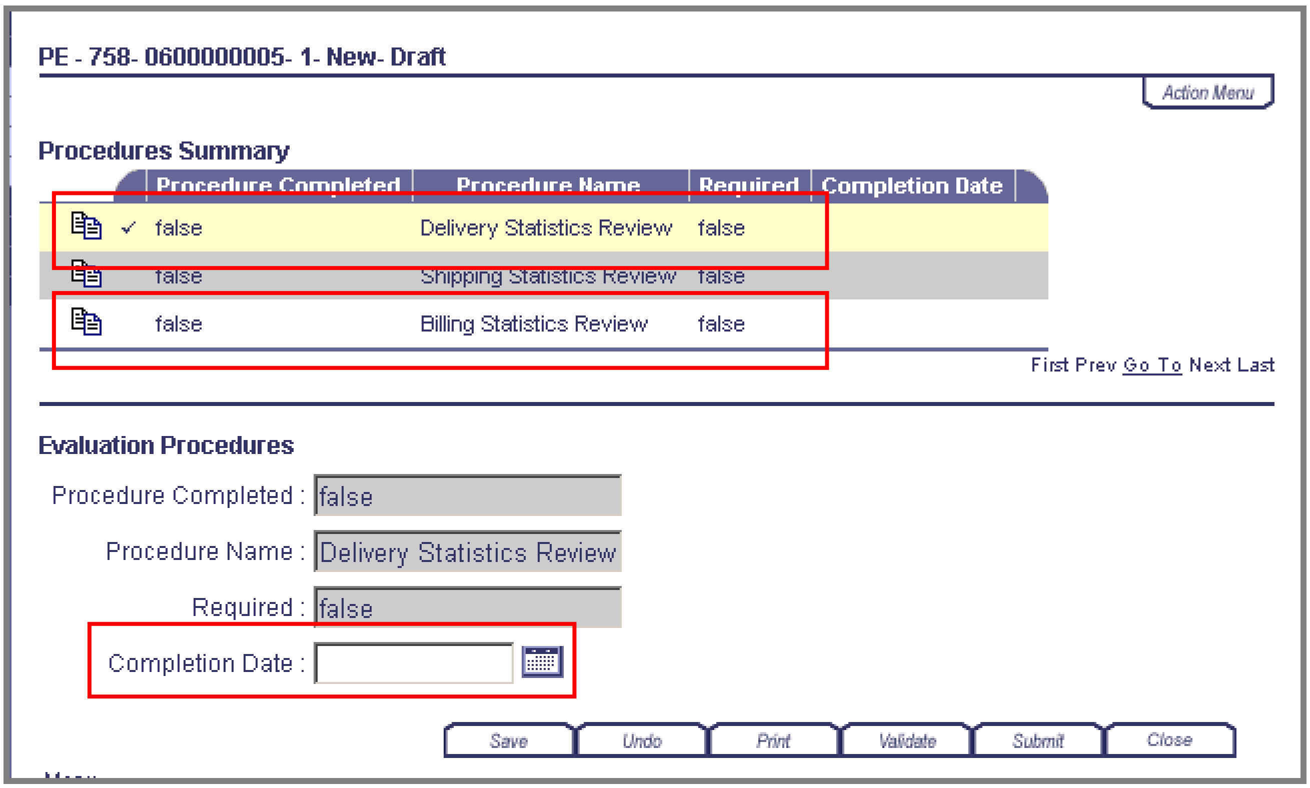
3. Ensure that the **PE** row is selected in the grid and click **OK**. A **Performance Evaluation** document (**PE**) is created.

4. Complete the **General Information** section of the **PE**. This section is used to establish which eMARS user is performing the evaluation as well as the time period being assessed. Note that all the information from the award has automatically populated the **PE** document.



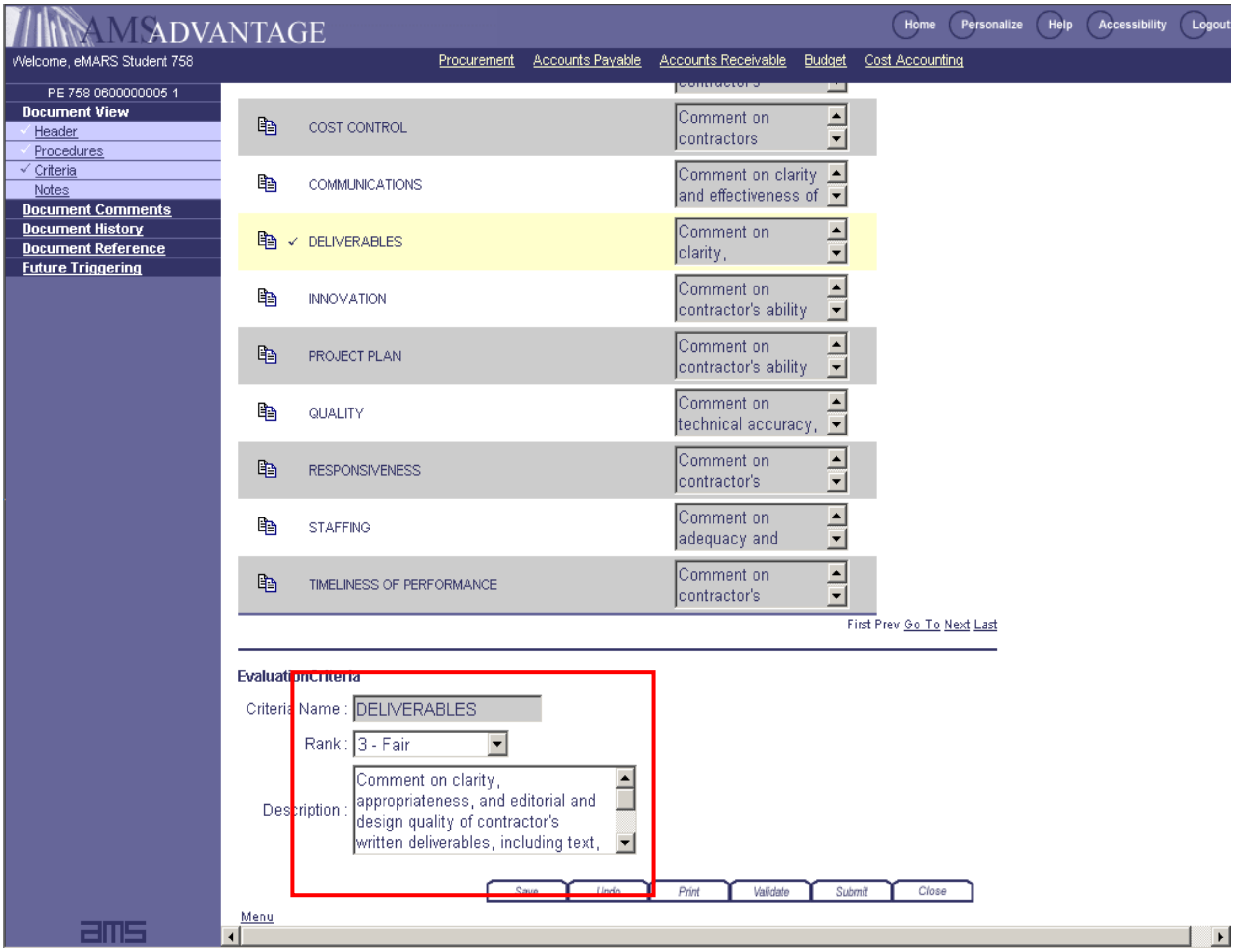
Required Fields	Values
Evaluator ID	**Select your Student ID from the Evaluator ID pick list.**
Evaluation Date	Enter **Today's Date**
Period Begin Date	Enter **Yesterday's Date**
Period End Date	Enter **Yesterday's Date**

5. Click **Load Criteria and Procedures** at the top of the page to load the standardized Evaluation Criteria and the **PE** document procedures.
6. Click **Procedures** in the Secondary Navigation Panel to transition to the Procedures Summary page.
7. Select the **first** and **third** Procedures in the grid and document when each procedure was completed by entering the date on which they were completed.



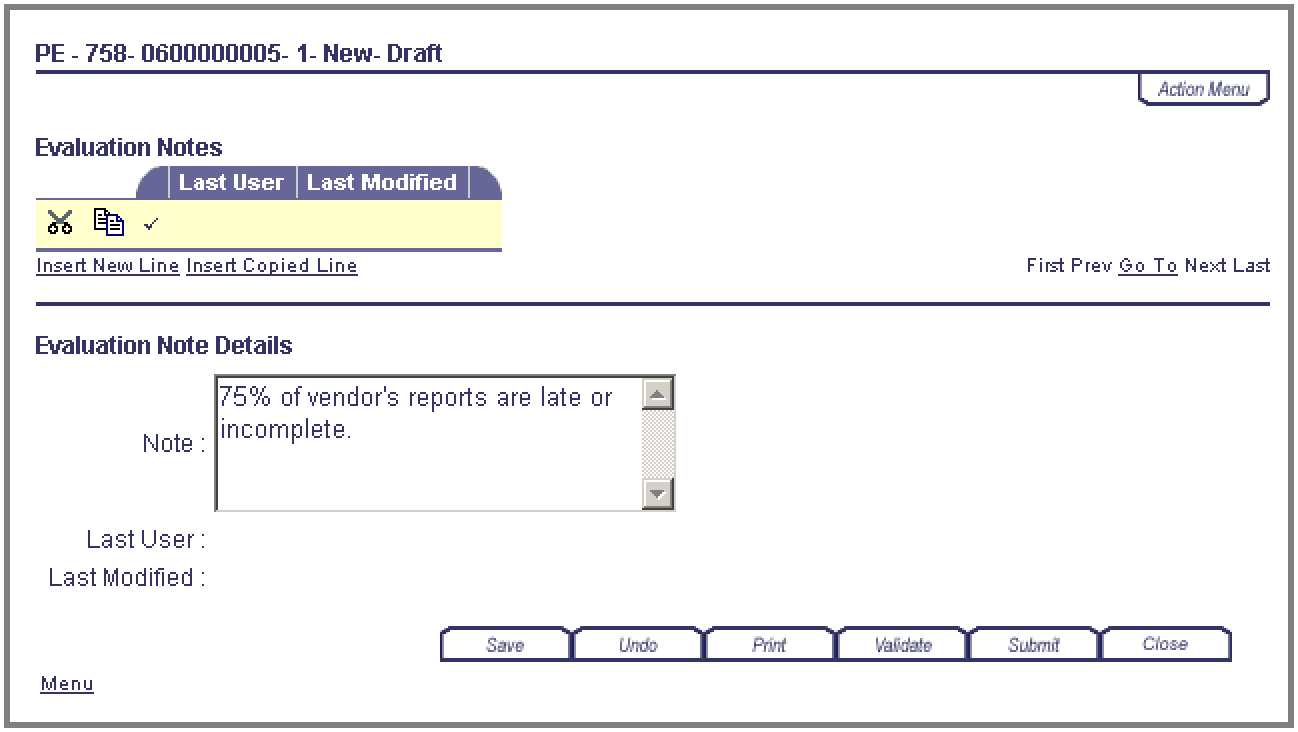
Required Fields	Values
Completion Date	**Click on the calendar and enter Today's Date.**

8. Click **Criteria** in the Secondary Navigation Panel to access the Evaluation Criteria page. This page lists the Criteria that were loaded from the Vendor Performance Evaluation Template table. Rank each of the criteria on this detail section (Unsatisfactory, Poor, Fair, Good, Excellent or Not applicable).



Required Fields	Values
Rank	**Select "3-Fair" for each Evaluation Criteria.**

9. Click **Notes** in the Secondary Navigation Panel. The Notes page opens where you may record specific comments or anecdotal information supporting your evaluation/assessment.



10. Click **Insert New Line** and enter the following:

Required Fields	Values
Note	**Enter "75% of vendor's reports were incomplete or inaccurate."**

11. Click **Validate** and then **Submit** the document to final.

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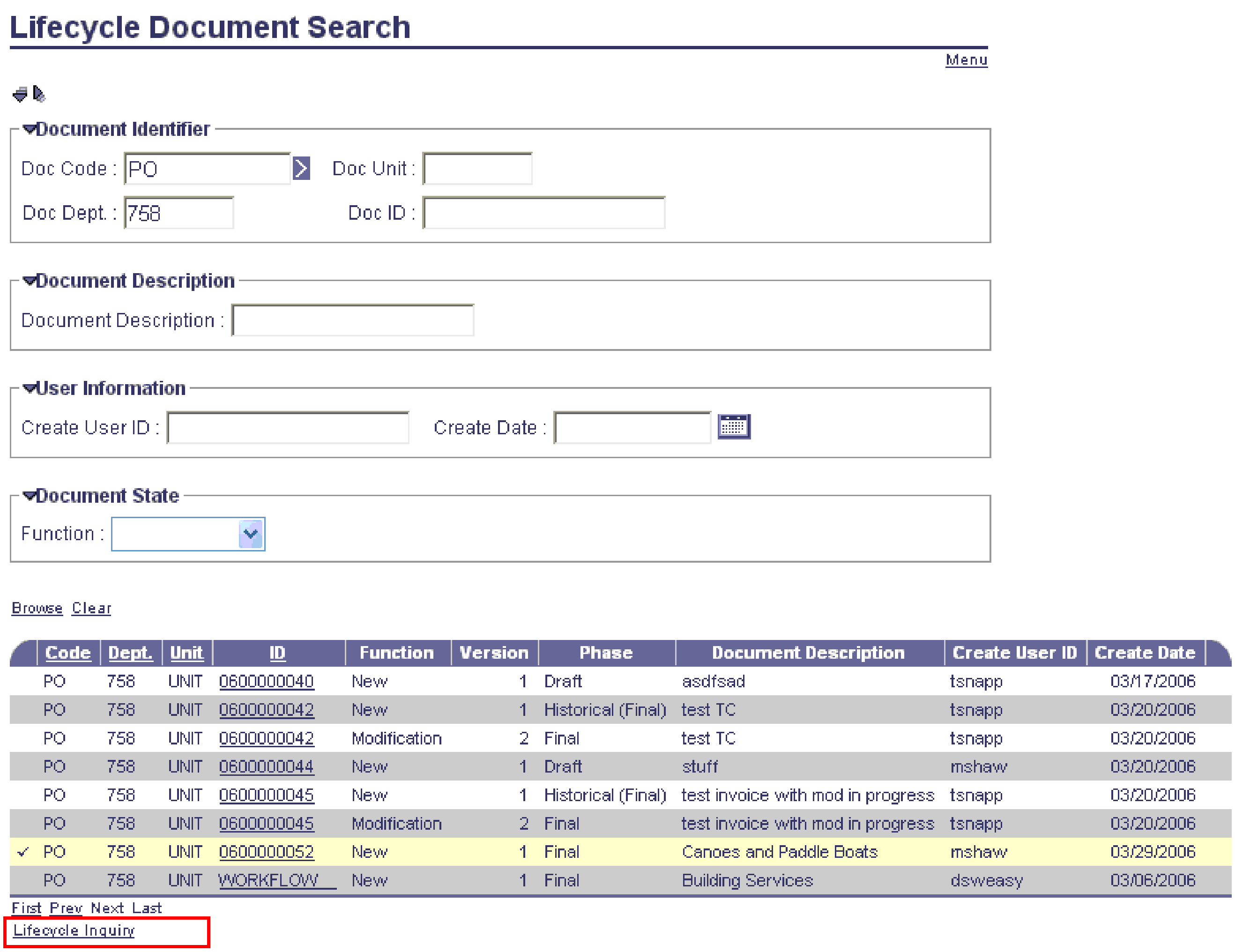
10 – Online Inquiries

Lifecycle (LINQ)

The **Lifecycle Inquiry** (**LINQ**) page allows you to view the complete chain of documents associated with a selected search document. When a search is performed, the document entered as the search criteria must have a **Phase** of "Final" or "Historical Final".

The **Lifecycle Inquiry** page may be accessed directly from one of two places: **Procurement Document Inquiry** or the **Lifecycle Document Search**. The Procurement Document Inquiry (**PRCUDOC**) allows the user to search by **Procurement Folder ID**, **Procurement Title**, or **Document Department**, or **ID**. The **Lifecycle Document Search Inquiry** (**LINQ**) provides similar search capabilities to the Document Catalog with the addition of being able to search by Document Description.



Lifecycle Document Search

Menu

Document Identifier

Doc Code : PO   Doc Unit :

Doc Dept. : 758   Doc ID :

Document Description

Document Description :

User Information

Create User ID :   Create Date :

Document State

Function :

Browse Clear

	Code	Dept.	Unit	ID	Function	Version	Phase	Document Description	Create User ID	Create Date
	PO	758	UNIT	0600000040	New	1	Draft	asdfsad	tsnapp	03/17/2006
	PO	758	UNIT	0600000042	New	1	Historical (Final)	test TC	tsnapp	03/20/2006
	PO	758	UNIT	0600000042	Modification	2	Final	test TC	tsnapp	03/20/2006
	PO	758	UNIT	0600000044	New	1	Draft	stuff	mshaw	03/20/2006
	PO	758	UNIT	0600000045	New	1	Historical (Final)	test invoice with mod in progress	tsnapp	03/20/2006
	PO	758	UNIT	0600000045	Modification	2	Final	test invoice with mod in progress	tsnapp	03/20/2006
✓	PO	758	UNIT	0600000052	New	1	Final	Canoes and Paddle Boats	mshaw	03/29/2006
	PO	758	UNIT	WORKFLOW	New	1	Final	Building Services	dsweasy	03/06/2006

First Prev Next Last

Lifecycle Inquiry

Exercise 6 – Perform a Lifecycle Inquiry (LINQ)

Scenario

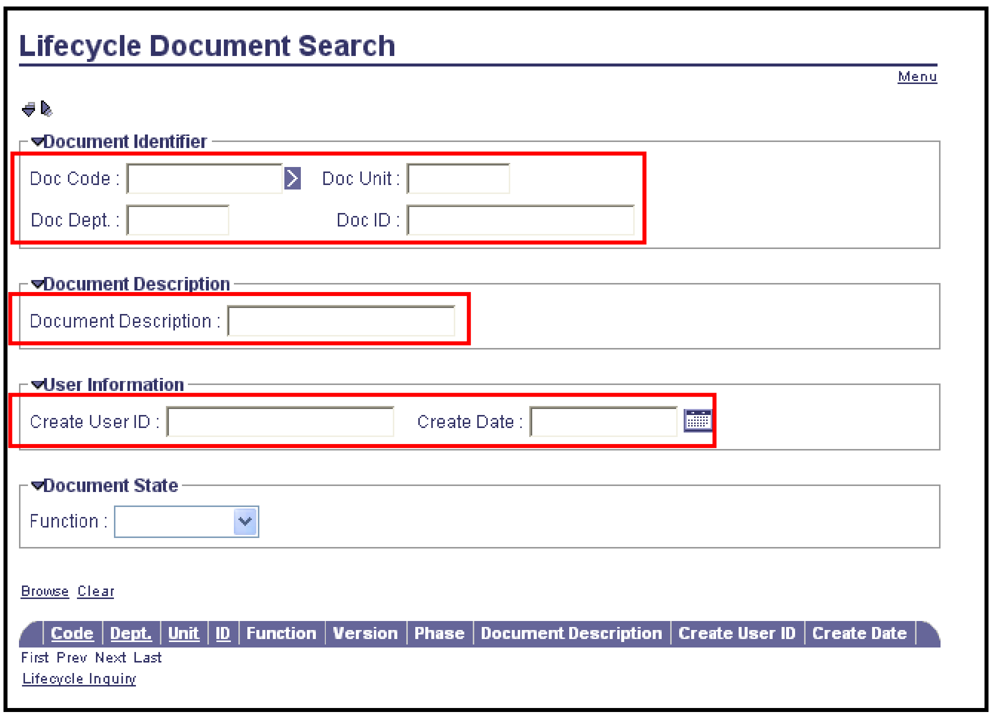
You need to find out the status of a Contract and see what other documents have referenced it.

Task Overview

You will access the **Lifecycle Document Search** page to find the specific Contract .

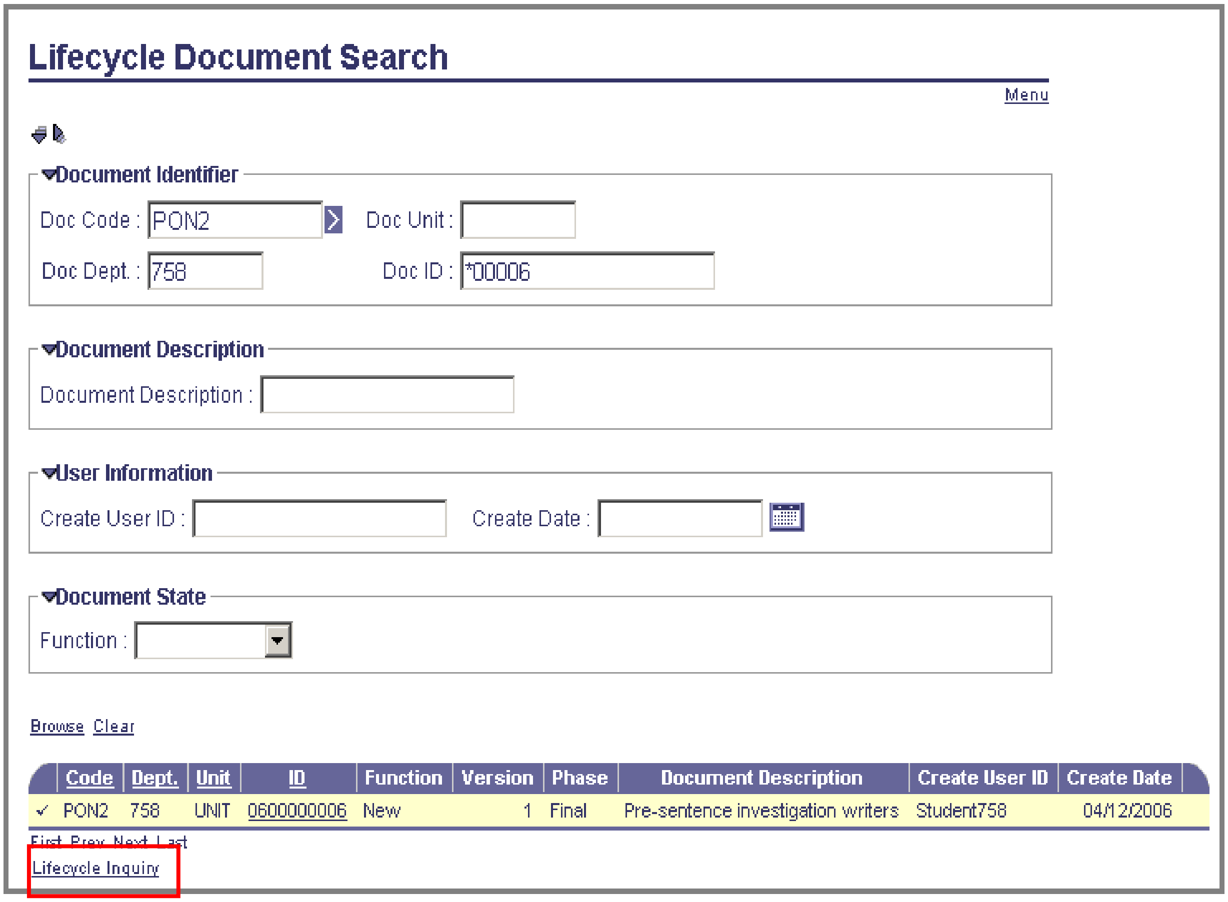
Procedures

1. Access your **Procurement Workspace**. Expand the **Quick Links** section and click **Lifecycle Document Search (LFDOCSCH).** The Inquiry will open.

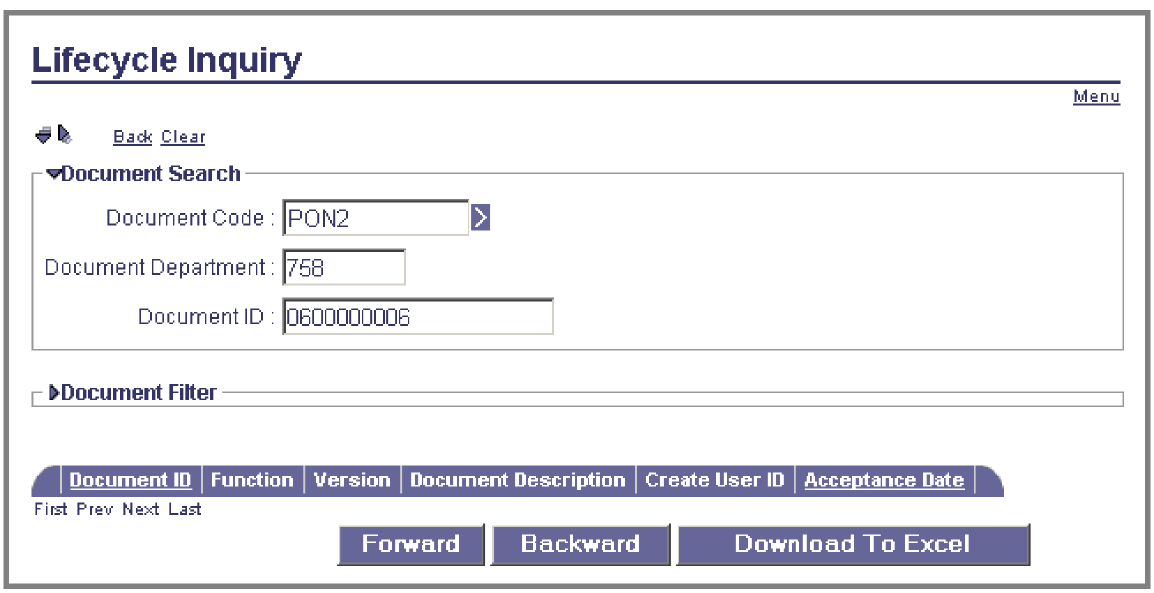


Required Fields	Values
Document Code	PON2
Doc Dept	758
Document ID	0600000006

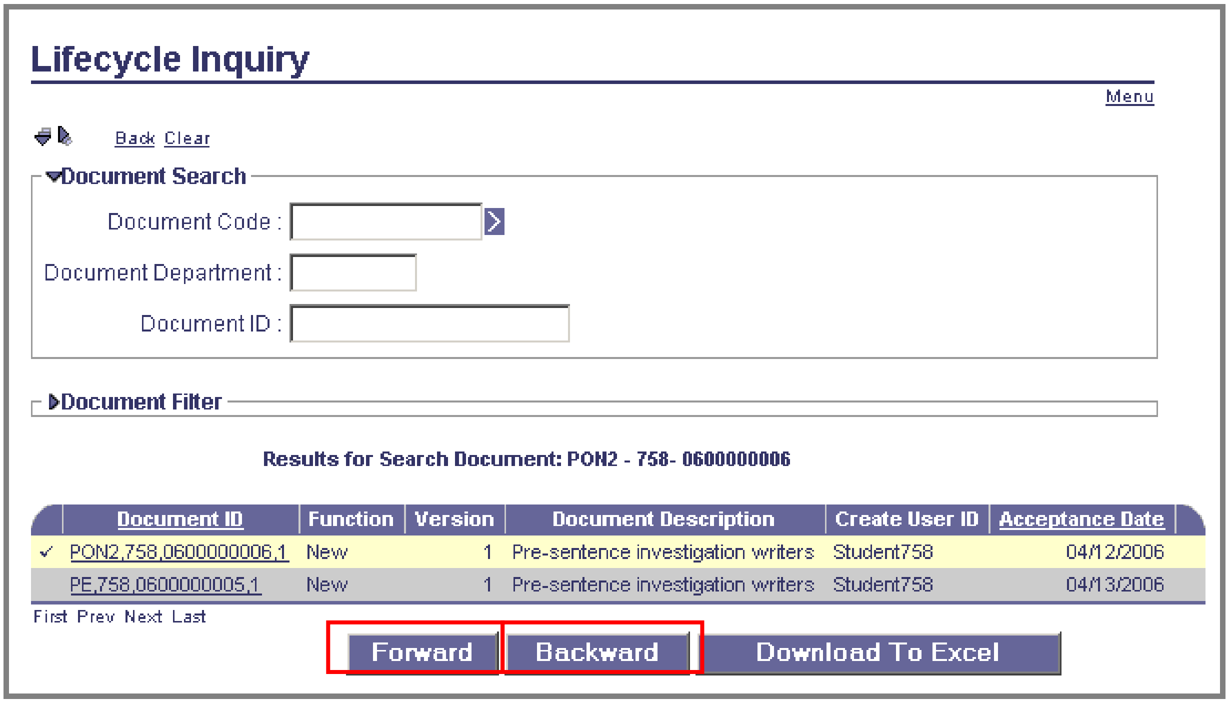
2. Click **Browse** to see all the documents that match your search parameters.



3. Select the row of the document you are searching for and click the **Lifecycle Inquiry**. The Lifecycle Inquiry will open populated with the document's information.



4. Click **Forward** to view all documents that reference the Source document.



5. Select a row in the results grid and click **Backward** to view all documents that are referenced by the selected document.

11 – Session Review

Summary Review of *Topic*

You should now be able to:

- Conduct a Competitive Negotiation using Solicitation, Solicitation Response and Evaluation document
- Create a **PON2** document and complete the **PON2** component
- Evaluate Vendor Performance related to a **PON2**
- Track documents and work in progress using **Lifecycle Inquiry**

Summary Review of *Topic* Quizzes

Review Questions	
A	**Terms and Conditions** may only be attached as MS-Word documents saved as **.XML**. True or False
B	Due to the implementation of eMARS the LRC will no longer require a **Proof of Necessity** to be included with each Personal Service Contract or Memorandum of Agreement. True or False.
C	You may download an EXCEL tabulation of all Bids received from the **EV** document **Action Menu**. True or False.
D	The **PE** document allows you to record free form comments about a Vendors Performance. True or False

Logout

You will complete this exercise by logging out of eMARS.

1. Click **Logout**. This closes the eMARS application and ends your session. You can now close the open browser windows.

NOTE: Please remember to select **Logout** prior to closing your eMARS session. Just closing the page will not immediately end your session.

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